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ABSTRACT

This manual provides guidance for local unions setting up worker education programs--from basic skills to job training. It is based on the experiences of many different Service Employees International Union (SEIU) locals with diverse programs. The introduction explores the nature of worker education programs, determines what benefits accrue to unions for such programs, and proposes four keys to success (involve the workers, involve the employer, establish an equal partnership, and allow enough time). Chapte 1 discusses program staffing, including administrator, support staff, learning advocates, counselors, advisory committees, and instructors. Program design is the topic of Chapter 2. Subjects covered include what workers want and need, what should be offered (adult basic education, English as a Second Language, job training, career ladders, certification, service providers, curriculum development, worker selection and assessment, accessibility, publicity, and program evaluation. In Chapter 3, the guide suggests ways to find funds to run the program, from negotiating it in union contracts to providing it as an employee benefit or getting grant money. (KC)

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Workplace Education from A to Z

A HANDBOOK FOR SEIU LOCAL UNION LEADERS

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A Letter from the President

Dear Sisters and Brothers:

To be ready for tomorrow, we must focus on training our members today. Given the opportunity to acquire the skills and knowledge needed to do the job, the American worker is capable of great achievements in today's world economy.

Unfortunately, many of our younger members enter the workforce with inadequate education and basic skills. Many of our older members have spent years in low-level positions, their educational limitations preventing them from applying for or qualifying for advancement.

Over the years, our union has struggled with the problem of under-education. Many of our locals have a long, proud tradition of union hall and workplace education.

As a member of the National Advisory Commission on Work-Based Learning, I have been a strong advocate of benchmark programs which promote cooperation between labor and management and involve workers in the design, implementation, and administration of work-based learning programs.

Workplace Education from A to Z is designed to provide guidance for the local union setting up a worker education program — from basic skills to job training. It is based on the experiences of many different SEIU locals with many diverse programs.

This guide shares lessons learned, gives warnings and directions, explains solutions from successful programs, and gives advice. There is no one answer — all programs are necessarily unique, and your local union must construct one which will meet the specific needs of your members and their workplace. This guide can provide you with the experience and expertise to do just that.

The education of our members affects their ability to become a positive force at the workplace, in their union, and in society as a whole. There can be no more important challenge in the workplace in the decades to come.

Cordially and fraternally,

John J. Sweeney

John J. Sweeney
International President

CE

Workplace Education from A to Z

A Handbook For SEIU Local Union Leaders

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The quotes and case studies in this manual came from meetings between the SEIU Workplace Education Program staff and representatives of the following local union education programs: Locals 6, 74, 144, 250, 285, 767, and 1199CT.

Additional assistance, information, and experience was provided by Locals 535, 715, 770, and 790.

Throughout the manual, we have used quotes from *Worker-Centered Learning: A Union Guide to Workplace Literacy*, Anthony R. Sarmiento and Ann Kay, AFL-CIO Human Resources Development Institute, 1990. Local unions wanting a more in-depth guide to worker education issues and programs should contact HRDI for a copy of this invaluable resource.

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The Learning Advocate training and the concept of the Learning Advocate were developed by the Center for Working Life in Oakland, CA.

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What Are Worker Education Programs?

The overall purpose of union-sponsored worker education programs is to help the members improve their quality of life by teaching them the skills necessary to maintain their current jobs or do them better, to move up to a higher job classification, to reach their own non-job related educational goals, and generally to feel more empowered.

This manual is intended to help SEIU local union officers develop appropriate programs to help members reach these goals. Unions are well positioned to use their knowledge of the workforce and the changing workplace to create effective programs that answer workers' needs. If such programs are left to management or outside educational institutions, they may not appeal to workers because the form or content of the teaching is unsuitable. People returning to the classroom after many years may also need extra social and academic support and the special understanding that the union can provide.

Worker education programs can include:

- reading and writing (or literacy) classes
- English as a second language
- high school equivalency training
- mathematics
- computer or word processing skills
- basic science courses for health care workers
- skills training for job upgrades

WHAT'S IN IT FOR THE UNION?

In addition to helping individual workers, a union-sponsored education program can benefit the union as a whole, by:

- **Generating support for the union's agenda.** When members see their union offering a bread and butter service that produces concrete results, they're more likely to be loyal supporters of other union programs and the union in general. Worker involvement in setting up the program increases communication between the union leadership and membership as well.

"One nice thing about this stuff . . . it's a value unto itself. It will last a long time. If 40 LPNs become RNs, if 100 people learn to speak English, a good thing was done, and even if everything else falls apart in the future, this was something concrete and useful."

"There can be a tendency for union reps or staff to feel guilty spending time on a 'luxury' like an education program, instead of organizing or grievance handling. Actually, it should be considered a legitimate part of their job, since it builds the union in other ways."

▶ **Increasing union membership.** Organizers can point to a successful education program as another union benefit. Additionally, members at sites with career ladders may be motivated to organize classifications outside their bargaining unit to include them in the program and be eligible to upgrade into the new positions.

Watch Your Language

To refer to what you offer as a "literacy" program risks limiting its scope and alienating potential participants. Most people think of "literacy" as simply being able to read and write, and do not include its secondary definition — "developing knowledge and competence." If your local is planning a wide-ranging program that goes beyond simple reading and writing to encompass job skills training or college prep, be sure to make that clear in your planning, publicity and recruitment efforts.

Even so, your members may feel the word is negative and not sign up for classes labelled "literacy." You may want to only talk about "education and training."

In this manual, we use the term "literacy" in its more limited sense —adult basic education in reading, writing and language skills.

▶ **Developing rank-and-file leadership.** Education programs can spark the interest of members who were not previously active in the union. In addition, some of the people attending classes are bound to evolve as leaders due to increased self confidence and competence.

▶ **Making the union rep's job easier.** As workers develop their job skills and assertiveness, they may be able to resolve problems at the workplace themselves. As their literacy and comprehension skills improve, they are more able to read and interpret the contract and prepare grievances written well enough to hold up through the grievance procedure.

▶ **Increasing job security for the unionized workforce.** Education and training programs can help union members respond to the rapid changes in the workplace and prepare them to keep their jobs when faced with new work processes and new technology. Job skills training helps workers take advantage of job upgrades and new opportunities. Training creates an educated workforce that will be competitive in the future and strongly rooted in the union.

▶ **Improving the union's relationship with the employer.** When the union and the employer collaborate on joint education programs, they start to interact in a more open, less confrontational way.

FOUR KEYS TO SUCCESS

A local union can decide to operate a work-based education program itself, including hiring and paying teachers, developing curriculum, recruiting students and so forth, or it can develop a joint program with management or with the local community college, vocational-technical school, high school, social service agency, or other partner.

Each of these approaches has advantages and disadvantages, as we'll see later on in this manual. But local SEIU leaders from around the country agree on four basic pieces of advice:

1. Involve the Workers

"When workers are involved in the planning process, they 'own' the program, and are more likely to trust and participate in it."

There should be a worker representative at every decision-making step. Having worker input in the initial stages can help ensure that what's offered is actually something the members need and want. Worker involvement in developing the curriculum guarantees that the course content is appropriate for the participants. And at the evaluation stage, workers are sometimes in the best position to assess whether the program has met its stated objectives and suggest ways to improve it.

2. Involve the Employer

"For once, management is not working against the union. We're in this together and we want this to succeed together."

Having union-management cooperation in all phases of planning the program is crucial to its future. Working together provides a stronger program in addition to enhancing the labor-management relationship. If all sides have invested time in hammering out the details — from assessments of need to release time — there are less likely to be misunderstandings or grievances down the road.

Involving the employer also can help ensure the program has a long-term perspective, especially if it's a job training project. Employers can predict what skills workers will need to keep up with their plans for workplace changes and new technology. Taking the employer's

future staffing needs into account may be the best way to protect the members' future as well.

3. Establish Equal Partnership

"Union involvement is the most important thing. Where you have a strong union presence and an active steward system, the education program works better."

As the one organization that represents the workers with no strings attached, the union should be a full partner in any joint program.

Because you know your members and the jobs they do, you are in the best position to design a program that addresses their educational needs. Workers are also more likely to trust a program planned by their own representatives.

It's tempting to turn the planning and administration of a literacy or training program over to education "professionals," but, by doing that you are relinquishing control over its relevance and distancing yourself from your membership.

4. Allow Enough Time

One of the most underestimated aspects of setting up a worker education program is how much time it takes.

Plan to spend a great deal of time on the initial start-up process — reaching an agreement with the employer and developing a plan — especially if the union is trying to build education into the con-

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"Before you start any program, be it reading and writing, ESL, or whatever, figure out the big picture. Bottom line issues like seniority, bidding, classifications, release time, and so forth have to be thought out in advance so you don't trip over them later on. You have to be prepared to spend an incredible amount of time up front arguing this out."

tract. Hammering out issues such as seniority, career ladders, job posting, and release time is not simple. But starting up a program with half-baked ideas can lead to possibly more time-consuming problems in the future.

If the union is applying for grant money, an employer may sign on without feeling they have committed themselves. Then when the grant comes through, they'll back off, saying, "We never agreed to any of this." So time needs to be spent up front to get a clear understanding and a firm commitment.

The time required depends somewhat on the employer's attitude towards the value of education programs. Build in more time up front if you have a difficult relationship with your employer or if management seems to think education is a frill. Your task is easier if your employer believes in the idea of upgrading current employees, or recognizes that it's to his or her advantage to help employees learn new skills, from speaking English as a second language and improving writing ability to learning how to use new equipment.

Even so, winning the support of top management is only half the battle. As one local leader put it, "It's important to involve lower-level managers so that they'll understand that the program is a benefit for them as well. This means not just a five-minute meeting or a short memo. You need to make the time so that they understand the nuts and bolts of the program and consider it a priority. This can make the difference in terms of the big things — like actually signing off on release time — to more subtle things, like whether they're supportive or discouraging."

Building Support

Be sure you establish a solid base in your internal political structure. A union program like this needs the support of the local's executive board. The leadership can bring the resources and prestige of your local to this new program. Keep them fully informed and work closely with them.

The ABCs Of Program Planning

CHAPTER ONE

Staffing Your Program

One of the first tasks for a local union setting up a worker education program is to plan for adequate, trained staff, including an administrator, support staff, learning advocates, counselors, and instructors.

THE DIRECTOR OR ADMINISTRATOR

Each program should designate someone whose *only* job is to carry out administrative tasks. It is unrealistic to assume that a union business agent or organizer will have the time to administer an entire education program.

The administrator could be a union staff member assigned specifically to the job or an outsider hired as director. The latter sometimes has the advantage of having a more neutral, less adversarial relationship with management. However, even if the director is acceptable to both sides, it should always be clear that he or she answers to the union, not to management.

Another approach is to set up a dual directorship, with one person established as the "education" specialist and the other as the advocate for the union. These roles can develop into a "good cop-bad cop" routine when dealing with management. The education person can address questions of content and purpose, while the union person can make sure workers' rights are protected by advocating for release time, job classifications, establishing career ladders, and so forth.

ALERT

Policy Issues to Resolve Up Front

- **Who works for whom?** In a joint union/management program, do the administrator and the teachers answer to the union or the employer?
- **How are problems resolved?** Who has the final word? What is the process for making decisions? How does the director know when to ask for help and when to proceed? How will the director be held accountable? How will the local be kept informed?
- **What about pensions and other benefits?** Should they be provided as they are to union staff members, or should the administrator be considered a part-time consultant?

SUPPORT STAFF

Larger programs must plan for part-time or full-time support staff to assist the administrator in carrying out the program's goals. Paid staff positions you may need to incorporate in your budget include clerical workers, secretaries and/or bookkeepers.

"If you get the workers involved, and the learning advocates and stewards, who are doing the recruitment for you, then what you've got is a worker-based program."

These projects always end up requiring more accounting time than is originally expected, so be sure to include adequate time for accounting and bookkeeping, particularly if you are going to add this project to the workload of your existing staff — you may end up overloading someone.

LEARNING ADVOCATES

Learning advocates, known also as "mentors," "peer counselors," and "learning stewards," are the key to a successful worker-based program. These are union members whose involvement guarantees that the program is responsive to the needs of the participants.

Programs that have learning advocates conduct pre-service training to make sure they understand their roles and responsibilities and are aware of some of the issues they may face in doing their jobs. Counselors train the learning advocates in peer counseling techniques, in building trust and overcoming skepticism and anxiety, in effective listening and communication skills. Program planners should make sure that money is included in the budget to provide for this training and to pay the advocates for their time. Where possible, paid release time and reduced workloads should be negotiated with the employer.

The activities of the learning advocates include . . .

1. Program development. Learning advocates should be an integral part of needs assessment and curriculum committees, working with teachers, counselors and program administrators to design work-based instruction and relevant course content.

2. Recruitment. During the recruitment process, which is best done through one-on-one contact, the advocate can help members overcome possible fears and embarrassment about "returning to school." The learning advocate can conduct pre-class interviews to establish the students' needs and educational goals and can direct them to the appropriate training.

3. Problem-solving. The advocate can play a role in making sure workers are following the course content as well as helping them deal with problems that may affect whether they complete the course. This means being available as a sounding board to discuss issues of self-esteem and confidence, following up on those who miss class to see if they need tutoring help or help finding child care or transportation, and possibly referring those who do need help to a counselor or tutor.

4. Representation. The advocates work to protect the students' rights in the classroom. They monitor classes to help teachers keep the course content relevant to the worksite and adjust the pace of instruction if students are having difficulty keeping up. By acting as classroom observers and talking with members on

breaks or at the workplace, they can get students' feedback and identify problems before they become conflicts. They also can underscore the union's role in providing educational opportunity and make sure credit is given where credit is due.

5. Evaluation. Because they have been continuously involved in all aspects of program development and implementation, the learning advocates are often in the best position to evaluate the success or failure of the program. They can identify problem areas and suggest adjustments to make the program even better.

What Makes a Good Learning Advocate?

- **Union experience**: familiarity with the contract and the grievance procedure and broad knowledge of the different jobs in the workplace.
- **People skills**: ability to listen and maintain confidences, to inspire trust and respect.
- **Self-confidence without arrogance**: ability to inspire others without telling them what to do.
- **Experience or empathy** with the issues students may face and the ability to relate to people's fear of failure and the difficulties inherent in returning to the classroom.
- **Enthusiasm** for and interest in the program.

Retirees can often serve as effective learning advocates because they have free time and a lifetime of work experience. They are also very effective as one-on-one tutors, especially when counselors have been able to carefully assign the student-tutor pairs to assure that the tutors have the knowledge the students need.

Obviously, choosing the appropriate learning advocates will have a profound effect on the program, as they soon come to represent the union in the classroom.

COUNSELORS

Many programs also have professional job counselors or union counselors who are paid to assess the learning needs of potential participants and help place them in the appropriate class or job training program.

These counselors supplement the activities of the learning advocates in the following ways:

1. Meet with students to develop individual education plans and advise on goal setting and problem solving. This can affect whether or not the student

completes the course he or she has selected.

2. Provide counseling and referral both in class and before and after. This can include identifying special problems a particular student may be facing in the learning process, such as fear of failure, lack of confidence in his or her ability to complete the course, or a deficiency in basic knowledge that makes it difficult to follow through. For example, a student may have been able to hide his or her inability to write — a skill that turns out to be critical to completion of the course.

3. Assess other needs students may have, such as child care or transportation, and help make arrangements for allowances.

4. Act as facilitators at regular meetings of the instructors, learning advocates and counselors from all facilities to trouble shoot and adjust the program as necessary.

5. Help train the learning advocates in their roles as peer counselors.

Assessment Tools for Union Counselors

Individual Education Plan questionnaires like the one reproduced below can help counselors clarify students' educational and job-related goals.

Individual Education Plan

Date:
Name:
Hospital & Worksite:
Job Title:
Worksite Education Class:
Counselor:

The Individual Education Plan was developed as a tool to help both the worker/student and the Workplace Education Program. The IEP provides you with a means to clarify your educational and job-related goals.

1. What do you hope to accomplish from taking this class?

2. How will you know when you have achieved your goals?

3. How do you like to learn things best?
   A. Read about it.
   B. Listen to talks about it.
   C. Have someone show and tell you about it.
   D. Try to do it yourself.
   E. Other (please describe) _____

4. What was your last year of school? _____

5. Have you had any additional courses or technical training?

6. What kind of work have you done in the past that you liked? Disliked? _____

7. Are there any types of work you would like to do instead of your present occupation? What steps would you need to take to accomplish this?

8. Is time a big factor in preventing you from getting training?

9. Are there any issues, besides time, that might prevent you from getting additional training or education? (i.e.: housework, family obligations, childcare, financial problems, emotional support from family and friends, etc.).

10. Did you have any questions or concerns about participating in this program before you signed up?
If so, what were they? _____
Have they been resolved? _____

THE ADVISORY COMMITTEE

An advisory committee should be set up in the initial stages to lay the foundation for the program and provide guidance in program design, development, and implementation. Here are some questions the planners will face:

- What are the goals of the program?
- How can we gain support for the program from funders, the employer, providers, workers?
- How can we find out what workers want?
- What specific services should we develop once we've found that out?
- Who's going to administer the program?
- Who will teach the classes?
- How do we pay for it?

An existing joint labor-management committee could serve as the core group for initial planning. Plan to resolve some thorny questions from the outset and translate the answers into your contract language.

1. How many representatives should each side have? The number of votes should be equal, with the program staff person being a non-voting facilitator. Management may resist sharing power or giving up traditional control. One way to ensure labor-management balance is to rotate the chairperson position, allowing equal time as chair for each side.

2. How will members of the committee be selected? If the employer selects his or her representatives according to job functions, the union should balance those choices with its own. For example, if the employer selects a department head, a line supervisor, and someone in the personnel office, the union can match their expertise with a steward, a learning advocate, and a business agent. Their education/training person can be matched with a union education person, someone who does steward training or health and safety, and so on down the line.

3. When and where will meetings be held? It's often difficult to schedule times or places that are convenient for both parties, especially workers. Rotating

"Inevitably, the employer is able to commit more people and more time to the planning meetings. For instance, many times our members had trouble getting release time to go to career ladder planning meetings, even though they're officially supposed to have it. Of course, management can always go, and the boss has more people to send than we do."

One Local's Advisory Committee

"Our program at Group Health, which is highly unionized, had an advisory committee with decision-making power. It didn't function as well as a true labor/management committee ought to, but it did fulfill that role.

"We had equal numbers. There were two stewards and the union rep on the union side, and the assistant head of nursing, the head of personnel, and a clinic manager representing the employer. The head of personnel acted as a front-line person who could get money and advocate for the program, and the head of nursing dealt with ideological questions.

"We chose the union side, they chose the management side, and the director was the facilitator.

"We met once a month with an agenda covering things that we needed to establish at each stage of the program. We'd discuss different aspects of the program, such as release time or selection of participants.

"Sometimes ideas would get tabled by the full committee and one representative from each side would sit down together and negotiate an agreement on that issue. A letter of understanding would be prepared, and it was done.

"We didn't discuss curriculum. That was deferred to a working committee of LPNs and medical assistants. The hospital's curriculum consultant wanted to do the curriculum all herself without consulting anybody, but everyone decided that we should go through the process of letting the workers decide what needed to be taught. That way they were more involved — we didn't just say, 'Here, take it.'

"The workers did an incredible amount of work on the project. They planned the whole curriculum, they interviewed people who wanted to get into the program and made their suggestions as to who should get in."

the location of meetings among the various facilities in the bargaining unit (i.e., different buildings for service workers, different clinics or hospitals for health care providers) allows for more balanced presentation of views. Allowing release time for worker reps makes it easier for them to participate. Meetings should be held regularly — monthly at least — and should be scheduled and announced well in advance so that everyone can make arrangements to attend.

4. How will information be communicated among members of the committee? The responsibility for taking minutes of meetings should be shared between the union and management. A staff person representing the union must be made responsible for making sure all members of the committee and any other union person involved — the officers, the board, the reps — receive copies of the minutes and any other information they will need, such as management directives, notices of meetings, and so forth.

5. How can we keep the discussion on track? Unrelated power struggles and internal politics can often influence the debate. One way to make things run more smoothly is to have a mutually agreeable facilitator who does not represent either side. If the director is perceived by management to be neutral, she or he is often the best person for the job, because the director's first loyalty is to the success of the program.

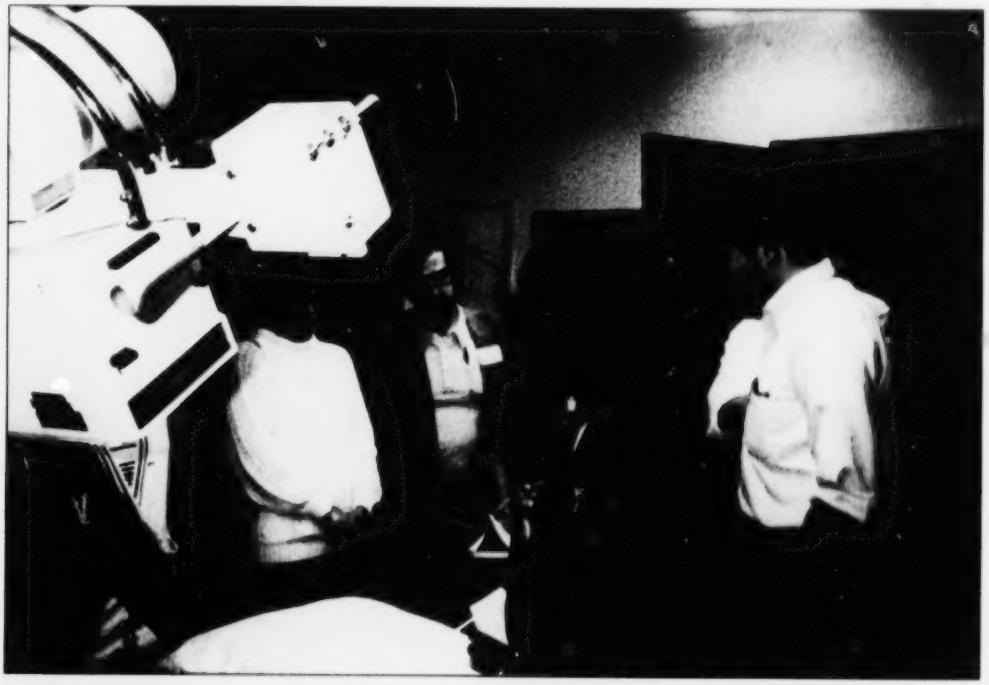
THE EDUCATORS

When setting up a worker education program, the union has the choice of hiring its own teachers or contracting with existing educational institutions or programs — community colleges, vocational-technical institutions, public school-based adult education programs, GED or high school diploma equivalency programs, or other courses offered by social service agencies or community groups.

Administrators who have been able to hire teachers directly rather than contracting with the community college bureaucracy report more positive results, spending more time dealing directly with the teachers and helping shape what gets taught, and less time being caught in the community college's well-established requirements and procedures.

Orientation and Training for Instructors

Whatever the source of instruction, the union will probably need to "educate the educators." Most locals report difficulty finding qualified instructors who also have a union background. Those with union expertise often don't have the teaching credentials some programs, particularly grant-supported or degree-granting programs, require. The solution is to



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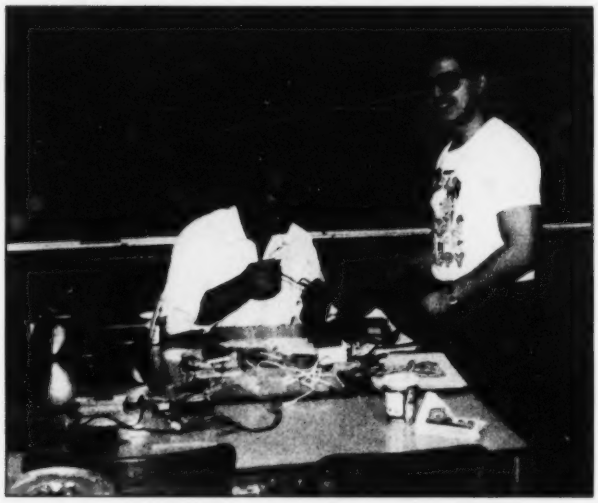
"As a union, we look for teachers who are certified but who also have a certain political outlook: people who empathize with the students as workers and who understand worker issues and the ways in which worker education differs from adult basic education."

provide orientation for the instructors and to maintain a firm degree of control over the curriculum.

Orientation can include tours of the workplace, an introduction to labor history, joint discussions with the learners



before classes begin to hear their goals and expectations, and discussion of the role of the union in workers' lives.

"I spent whole mornings with her," said one program administrator about an instructor, "explaining what we do . . . what kinds of struggles we go through with employers . . . how our members and stewards are treated . . . nuts and bolts about the contract."

Another local union put the instructor through stewards' training, including the political aspects of it, such as how to represent a worker in grievance cases and how to develop a rapport with the boss. They found that because the instructor knew she was getting access to something management wasn't, she was more responsive to the union point of view.

It's been noted that teachers are often interested in this type of orientation because they realize they're in an alien position. "If you're a good, caring teacher, you want to be responsive to the different

Choosing Instructors

Here are some questions that can help you identify teachers who might be most comfortable with a worker-oriented education program:

- Do they have experience teaching adults? Any union experience?
- Have they ever taught in a non-school setting (such as a workplace or union hall)? Have they ever used non-traditional teaching materials, such as work-based reading or math problems?
- What do they know about the industry and the skills workers use on the job?
- Are they willing to cooperate with the union in developing the curriculum?
- Are they aware of cultural or ethnic differences or tensions that may exist among your members?

Credit: *Worker Centered Learning*, HRDI

environments in which you find yourself," said one local leader.

Training the teachers is, of course, more rewarding if your program has built-in continuity and permanence — if you know that the time invested in your instructor will pay off in many classes over the years.

Sample Job Aids for Instructors

This guide to using job aids helps instructors choose work materials to teach from and develop new materials to help workers learn better on the job.

ON-THE-JOB-TRAINING

1. Analyze task to be taught

Key Steps	Essential Knowledge	Skills	Attitudes

2. Focus on what your trainee needs to learn. On the above chart, cross out the knowledge, skills, and attitudes your trainee already has.

3. Write performance objectives:
Given _____ the trainee will _____
Standards:
Time Limit:

4. Decide on sequence for teaching steps.

5. Decide on approach:
- Continuous skill? provide whole practice
- Discrete skill? provide progressive-part process
- Job aid?
- Preferred learning styles?

6. Provide training:
- tell what you will be doing
- do it as you tell
- ask trainee to do it while you coach
- provide for independent practice
- give feedback

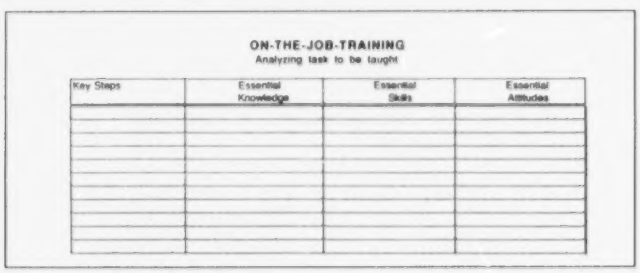
Developing Job Aids Worksheet
(Developed from ASTD Info-Line *How to Produce Great Job Aids*)

The seven major questions you should ask when planning, developing and evaluating job aids are:

1. Is there evidence that the user will benefit from using the job aid—save money, save time, make the job easier or more accurate?
2. Do the introduction and title set the context for the user?
3. Is the job aid clear and understandable?
4. Does the job aid use visuals well?
5. Is the job aid well-designed and easy to use?
6. Is the job aid durable and reusable?
7. Does the job aid invite use?

The ASTD booklet on Job Aids listed the following questions under the major questions given above. See if you can identify where they put each one.

____ Are examples used when appropriate?
____ Do they indicate when the job aid is to be used?
____ Do the instructions assume skills that the user may not have?
____ Are words and sentences short?
____ Does it say what it is?
____ Are the reasons for choices explained?
____ Are visuals clearly drawn and of high contrast?
____ Are the instructions free of unneeded detail?
____ Is it easy to use while performing the task?
____ Do visuals contain necessary detail?
____ Are the instructions clearly and correctly sequenced?
____ Do they specify who the user is assumed to be?
____ Do they specify what knowledge or tools the user will need in order to use the job aid?
____ Does the job aid avoid new or confusing terms?
____ Are the instructions clear?
____ Are visuals as simple and uncluttered as possible?
____ Does it appear easy to use?
____ Can the user do any one step or element of the task without consulting the job aid more than once?
____ Are critical words such as *not* or *all* highlighted by using italics, ALL CAPS, underlining, or bold type?
____ Are there few words?
____ Is its importance evident to the user?
____ Is motion and direction shown with arrows?
____ Are different sections easy to find from a table of contents or use of tabs?
____ Do instructions appear together with their visuals?
____ Is there plenty of white space?
____ Is spelling and grammar correct?



ON-THE-JOB-TRAINING
Analyzing task to be taught

Key Steps	Essential Knowledge	Essential Skills	Essential Attitudes

Sample Instructor Guidelines

SERVICE EMPLOYEES INTERNATIONAL UNION

WEP

WORKER EDUCATION PROGRAM

Dear Instructor:

Welcome to the Worker Education Program! We are very excited to have you participate in this innovative project which brings education to the workplace. We have put together this packet to provide you with information about your class, answer questions you may have about the program, and introduce you to the various players involved in WEP. Please review the enclosed material and let us know if you have any questions.

WEP Program Description
Included in this packet is a two page description of the entire project. Please review it. If you have any questions call us at the WEP office. This is a grant funded project designed to develop educational opportunities to assist hospital workers. Each hospital has assigned management and labor representatives to help implement the program.

Course Lists
Included in this packet is a list of students who signed up for your course. This list represents those workers who have filled out a course registration form for WEP, and who were then selected by the labor/management committee at the hospital to attend the course. Only in those instances when too many workers sign up for a course does the labor/management committee get involved in the selection process, otherwise anyone who has signed up and is qualified can enroll in the course. Please ask us if a specific assessment was done to qualify the worker/students in your course. Assessments are done for some of the WEP courses, but not all.

After two weeks of class we will ask you to send us a revised class list. (Alter the enclosed list to reflect your actual class and return in the envelope provided). If someone ends up taking the class who was not on the original list given to you, please have that student(s) fill out a course registration form (several are included in this packet), and send them to us in the enclosed envelope. We need this information for our grant.

EXPANDING CAREER LADDERS FOR HOSPITAL WORKERS

A JOINT LABOR MANAGEMENT PROJECT OF

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If you need any specific materials, such as an overhead projector, blackboard, etc. please let us know, or talk to the labor or management representative at your hospital. You will meet them the first day of class.

Bunker Hill Community College
Whether or not you are employed by Bunker Hill Community College (BHCC) on a regular basis, BHCC is your official employer for this project. If you have any questions about your paycheck, about books, about grades, etc., please contact Kate Cauble, Assistant Dean of Allied Health and Nursing, (617) 241 - 8600 X575.

Union Counselor
At various times throughout the semester, Linda Beach, the Union Counselor, will visit your class. Linda will probably let you know ahead of time when she is coming. Her role is to assist worker/students with the course, and help them plan for future courses and career plans.

All worker/students are eligible to receive up to 50% paid release time to attend the course, if it is offered during their shift. If there are any problems with a student receiving their release time, please have them call the union counselor, Linda Beach, at the WEP office, (617) 422 - 0171. She is here to assist the workers with any problems they may be having. We would also appreciate your assistance with letting us know if any worker/students drop out of your class. Linda will be following up with all drop-outs to have them fill out an evaluation form to try and find out what we can do differently next time to help meet their needs.

Attendance
We have enclosed attendance sheets based on initial class enrollment lists. Please revise lists accordingly, and send them to us in the enclosed envelopes.

Grading
We encourage instructors to use the same grading system they use when teaching this course elsewhere. Those students receiving college credit will need to meet typical college standards.

For those college prep or adult basic education courses, college standards are less important. Our goal is for these students to learn something new, to improve their self esteem as learners, and to be inspired to continue their education. As long as these students have made individual progress, then they should 'pass' the course. Some instructors have divided their courses into Modules so a student can complete one, two or three Modules and still have accomplished something by the end of the semester.

For further clarification on grading, please contact Kate Cauble or Harneen Chernow.

Evaluation
At the end of the semester, all students will be asked to fill out a WEP evaluation of the course. WEP also has two separate Evaluations being done of the program. Evaluators will all let you know ahead of time if they are planning on attending your class! Towards the end of the semester, BHCC will send you a grade reporting form to fill out, and WEP has a brief, one page evaluation for teachers to fill out on each student.

Graduation
The last class of each semester is usually saved for a small graduation ceremony. We have certificates that are passed out (which have a place for the instructor to sign), and representatives from the hospital and union usually come and say a few words. We also encourage any student or teacher who would like to share a few thoughts about the course to do so.

If this is the first course you've taught in the workplace, we encourage you to adapt what you teach in the classroom to the hospital environment. Most of the students in the class are participating in this program either to promote to another job at the hospital, or to improve themselves in their current position. Some of the students also want to go back to school in a health field.

Because this project works with hospitals throughout the entire state of Massachusetts, it has been difficult to bring Instructors together. It is our goal however, to give Instructors a chance to meet each other and come together during the semester. BHCC and WEP will be trying to schedule these meetings and you will be compensated extra to attend one of these Instructor sessions.

Some questions worker/students might ask you:

Q. What courses will be offered next?
A. We aren't sure, we are offering courses that workers are interested in taking and that can be taught in the workplace. If someone would like to discuss course happenings, have them call WEP.

Q. How is this program being financed?
A. This program is being financed by the Labor Shortage Initiative, which is funded by an assessment on each hospital based on gross patient revenues. The Department of Medical Security administers all Labor Shortage Initiative monies.

Q. Where will my college credits come from?

A. Because BHCC is the educational subcontractor for this grant, all college credits are given through BHCC. If, however, a student wants to transfer their credits to another community college they are easily transferable.

We appreciate any feedback you are interested in giving us regarding this program or your course. This project is constantly evolving and improving so your ideas are welcome.

Enjoy teaching the course!

Sincerely,

WEP Staff

List of Information Included in Packet:

1. Program Description
2. Class List (to be updated & sent to WEP in two weeks)
3. Attendance Forms
4. Copy of Evaluation that students will complete
5. Extra WEP Registration Forms
6. Return Envelopes

CHAPTER TWO

Designing Your Program

Workers will be more likely to appreciate and participate in an education program if it directly addresses their own educational goals — whether those are the skills required to move on to a new or better job or those needed to cope with everyday life challenges and become better advocates for themselves and their families, on and off the job.

WHAT DO WORKERS WANT AND NEED?

The best way to find out what workers want is to ask them directly, through surveys or interviews or in small group discussions. Not only does this enable the union to design a better program, it helps insure participation and interest on the part of the workers themselves.

Reasons Workers May Want A Literacy Program

- to qualify for a promotion at work
- to learn skills that can lead to new kinds of work
- to meet job certification requirements
- to prepare for college
- to get a high school equivalency diploma
- to take college courses or to earn a degree
- to master functional skills needed in everyday life
- to be able to read to children or grandchildren
- to help children with their homework
- to enrich themselves intellectually
- to feel better about themselves
- to become more active in their community and union
- to meet citizenship requirements
- to learn English as a second language
- to learn Spanish or another language helpful on the job

Credit: *Worker-Centered Learning*, HRDI

You can't force feed education. Develop your program based on your learners' needs — take them from where they are and move them forward.

Having workers participate in their own learning is part of the education

"No matter what you do, you are going to end up having to construct something for your people, for their level, for their worksite, for their situation, for their interests."

process, teaching them how to evaluate what they know and what they need to learn, and giving them credit for where they start.

The list of questions on the next page can be used in discussions with members, union staff, and management to gather information on workers' education and training needs. From these discussions,the planning team can work on the big picture — the broad outline of the program that would be most helpful to the widest range of participants. Once this broad outline is established, the union can work out the program's details — who, what, when, where.

Refrigeration Repair Class

Building Maintenance Class

ESL Class

Introduction to Computers

Sample Questions to Determine Students' Educational Needs

Discussions with union members:

1. What changes have you seen in your job?
- What training are you getting to help you learn new job skills?
- Are there changes you would make in work practices that would help you perform your job?
- Does the equipment you use make your job easier?

2. Which of these basic educational skills do you use most in your work? Which one do you use less often?
- Reading?
- Writing?
- Oral communication?
- Math?
- Problem-solving?
- Others?

3. What kinds of written materials do you use in your job?
- Procedures manuals?
- Inventory sheets?
- Operating instructions?
- Safety notices?
- Job descriptions?
- Employee benefits handbooks?
- Others?

4. What difficulties do you have when you use those written materials?
- Hard to use?
- Written in complex or confusing language?
- Other specific problems?

5. What training have you been given to help you use these materials?
- Training in a classroom setting?
- Informal training by another worker?
- Other training?

6. Are the written qualifications for your job realistic, considering the work to be performed?
- Are further skills appropriate for doing the job?
- What problems do you encounter performing your work?
- Should the work be redesigned? (If so, in what way?)

7. What would help you perform your job better?
- Different equipment?
- Different work practices?
- Education or training?

8. What additional skills would you need for job advancement?
- How long have you worked in your current job?
- What are the jobs to which you might advance (either with this employer or elsewhere?)
- What new skills do those jobs require?
- What education or training would help you acquire those skills?

9. What kinds of reading do you do?
- Reading for pleasure?
- Reading the newspaper?
- Reading to your children or grandchildren?

10. Have you taken GED or adult education classes to improve your reading skills?
- What did you like or dislike about that program?
- Did you complete the program?

11. Are you interested in continuing your education?
- What subjects interest you?
- Would you like to complete your high school degree?
- Take a college prep course?
- Enter a college degree program?
- Take a specialized technical course?
- Study for the citizenship exam?
- Take other courses?

12. Aside from work, how would further education help you with your home and family responsibilities?

13. What additional services would make it easier for you to attend classes (for example, child care)?

Discussions with sympathetic supervisors:

1. What general problems do workers have performing their jobs?

2. What training does the employer currently provide to address this?

3. What changes might help workers perform their jobs better?
- More education and training?
- New equipment?
- Restructuring of work processes?

Discussions with union officers, stewards, and staff:

1. What changes are taking place in the workplace?
- Has new equipment or new technology been introduced?
- Have work practices changed?
- Have layoffs taken place?
- Have new jobs been created? Or old jobs restructured?

2. Are members troubled by new assignments?
- Problems with new equipment?
- Concern about increased reading, writing, or math?
- Have they filed grievances over new job assignments, which may reflect the above problems?

3. Are workers aware of new job opportunities, and do they apply for the jobs?
- Do new job openings have formal education requirements?
- If so, do your members meet these requirements?

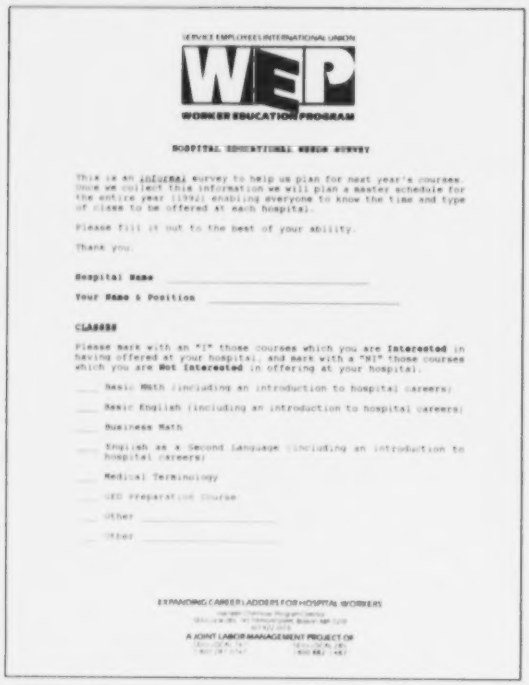
4. Do members attend local adult education programs?
- Are they satisfied with the programs?
- Have they dropped out of such programs?

5. Does the union (or the employer) offer a tuition reimbursement program?
- Do members use it?
- What kinds of educational programs are they taking?

6. Do members understand the terms and conditions of their fringe benefits, such as health, legal, and education?

7. Do any government certification requirements affect members' jobs (as has been the case with nurse aides, school firemen, etc.)?

Sample Surveys of Educational Needs



SERVICE EMPLOYEES INTERNATIONAL UNION

WEP

WORKER EDUCATION PROGRAM

HOSPITAL EDUCATIONAL NEEDS SURVEY

This is an informal survey to help us plan for next year's courses. Once we collect this information we will plan a master schedule for the entire year (1992) enabling everyone to know the time and type of class to be offered at each hospital.

Please fill it out to the best of your ability.

Thank you.

Hospital Name _____

Your Name & Position _____

CLASSES

Please mark with an "I" those courses which you are **Interested** in having offered at your hospital, and mark with a "NI" those courses which you are **Not Interested** in offering at your hospital.

___ Basic Math (including an introduction to hospital careers)

___ Basic English (including an introduction to hospital careers)

___ Business Math

___ English as a Second Language (including an introduction to hospital careers)

___ Medical Terminology

___ GED Preparation Course

___ Other _____

___ Other _____

EXPANDING CAREER LADDERS FOR HOSPITAL WORKERS

A JOINT LABOR/MANAGEMENT PROJECT OF

Please list your top three choices of courses you would like offered at your hospital. Please rank in order of interest (with 1=strongest interest):

1. _____ Yes Maybe No

2. _____ Yes Maybe No

3. _____ Yes Maybe No

4. _____ Yes Maybe No

In order to facilitate the process of setting up courses at different hospitals, it is helpful for us to know whether you have hospital employees available and interested in teaching any of the courses. Next to the three courses listed above, please circle **Yes, Maybe or No,** next to the title depending on whether you yes, have someone who could teach it; maybe, you aren't sure whether you have someone to teach it; or no, you don't have anyone to teach it.

How many courses would you like to offer during 1992:

___ 1 ___ 2 ___ 3 ___ 3+ ___ 0

Classes can be taught in the Spring, Summer or Fall terms. Please check those terms which would work best for your hospital and workforce:

___ Spring ___ Summer ___ Fall ___ Doesn't Matter

Please list the most prominent job categories you believe that worker/students come from who are most likely to take the ESL, Adult Basic Education (ABE), GED Prep and Medical Terminology Courses:

ESL: _____

_____

ABE: _____

_____

GED: _____

_____

MED TERMINOLOGY: _____

_____

INTERNS

In addition to the 11 Medical Radiography Interns who will be continuing their coursework and practicums during 1992, WEP will be adding five (5) new interns. As suggested in the grant, it is the goal to choose a **new** Allied Health field for these interns to enter.

How many of these intern slots is your hospital interested in having?

_____1 _____2 _____3 _____0 _____Unsure

Please rank the Allied Health fields listed below in terms of your hospitals' labor need and interest (with 1 = strongest interest and 4 = least interest):

___ Physical Therapy Assistant

___ Medical Records Technologist

___ Medical Radiographer

___ Other field _____

Please use this space to describe or list any other courses or training options you are interested in offering through WEP.

To avoid duplication, please list any other courses or training options being offered at your hospital now (or being planned for next year) which are separate from WEP.

WEP0001.WC

Dear Member:

Local 74 is conducting a study to determine your interest in participating in its Training & Scholarship Fund. We ask your cooperation in filling out some information that will assist us in determining your needs. All information will be kept confidential. After completing please return to:

Training & Scholarship Fund – Local 74 S.E.I.U.

[redacted]

We have enclosed a self addressed stamped envelope for your convenience.

Thank You for Your Cooperation

(Place an "X" in the appropriate box or fill in the spaces provided)

1. WHAT CLASSES HAVE YOU TAKEN AT LOCAL 74 ?

☐ Air Conditioning & Refrigeration
☐ Air Pollution Basic Boilers
☐ Basic Electricity & Alarm Installation
☐ Building Maintenance
☐ English as a Second Language
☐ Health & Safety
☐ Introduction to Computers
☐ Locksmith
☐ Pest Control Technology
☐ School Custodial
☐ Small Engine Repair
☐ Other _____
☐ None

2. WHAT SPECIFIC COURSES WOULD YOU BE INTERESTED IN TAKING ?

☐ Air Conditioning & Refrigeration
☐ Air Pollution Basic Boilers
☐ Basic Electricity & Alarm Installation
☐ Building Maintenance
☐ English as a Second Language
☐ Health & Safety
☐ Introduction to Computers
☐ Locksmith
☐ Pest Control Technology
☐ School Custodial
☐ Small Engine Repair
☐ Other _____
☐ None

3. WHAT IS YOUR PREFERENCE FOR A LOCATION FOR CLASSES ?

☐ New Dorp High School
☐ Susan Wagner High School
☐ Staten Island Technical High School
☐ Other _____
☐ None

4. WHAT BOROUGH DO YOU WORK IN ?

☐ Staten Island
☐ Brooklyn
☐ Queens
☐ Manhattan
☐ Bronx

5. WHAT BOROUGH DO YOU LIVE IN ?

☐ Staten Island
☐ Brooklyn
☐ Queens
☐ Manhattan
☐ Bronx

6. WHAT SCHOOL DO YOU WORK IN ?

_____

7. HOW MANY YEARS HAVE YOU BEEN A MEMBER OF LOCAL 74 ?

☐ Under 1 Year
☐ 1–2 Years
☐ 3–5 Years
☐ 6–10 Years
☐ 10–15 Years
☐ 16 Years or More

8. WHAT IS YOUR RACE ?

☐ Caucasian
☐ Hispanic
☐ Black
☐ Asian
☐ Other

9. WHAT IS YOUR AGE ?

☐ 17—21 Years
☐ 22—29 Years
☐ 30—35 Years
☐ 36—40 Years
☐ 41—50 Years
☐ 50 Years or More

10. WHAT IS YOUR SEX ?

☐ Male
☐ Female

Thanking you in advance for your cooperation. If you have any questions please call us at (718) 370-7400

LOCAL 74

TRAINING & SCHOLARSHIP FUND

"Our objective is to educate our people up to a high school equivalency level. How long that takes depends on where they start. We have people who come in at second-grade level, and some who are high school drop-outs. You can't set a time limit for getting to a GED — it may take years. That's why we shoot for an on-going program."

WHAT SHOULD WE OFFER?

Your surveys and discussions will probably identify three main types of education desired or needed by your members: adult basic education or ABE (reading and writing), English as a second language (ESL), and job training. Each type of training should be designed with learners' needs in mind.

Adult Basic Education

ABE classes should be worker based. This means that reading materials should be work-related — such as instruction sheets, material safety data sheets, AIDS and other bloodborne disease literature — and should incorporate the specific vocabulary of the job and worksite. Writing assignments should involve tasks workers might face on their jobs, using forms they may have to fill out and reports they may have to submit. Math problems should be relevant, such as figuring ratios of solvents or fractions of materials.

Union-specific material can be incorporated into the program by teaching contract language, grievance interviewing and writing, and figuring wage rates and overtime. Other skills which are often included are study skills, note-taking, and test-taking tips.

Many members who have not completed high school will want to get their GED, the Graduate Equivalency Diploma. Adult Basic Education may or may not prepare your members to take the GED exam. ABE classes will vary according to the workers' needs. Some classes will need to begin at a very basic level, while others may be what community colleges often call developmental or college prep, which are for workers who need only a little remedial help. Be careful not to promise a worker his or her GED, when

Learning Steps

These five steps in one training program show how a student can move from one level to another. Training opportunities—either classes or tuition reimbursement—are offered at every level. Members may continue in a progression from one step to the next or may exit after the goal within a specific step has been completed. The first step, "Training and Evaluation," determines at which point the member will begin his or her studies.

EVALUATION	PREPARATORY	COLLEGE FOUNDATION	PRE-HEALTH OCCUPATION PREP	DEGREE-DIPLOMA
Testing Counseling	-GED -ESL -EDP -CNA -Basic Skills: +Reading +Writing +Math	Remedial Level College Courses	Pre-Requisite Level College Courses	Health Occupation College Degrees or L.P.N. Diplomas
GOAL: Direct the member to appropriate program	GOAL: Basic Skill improvement Attainment High School Diploma	GOAL: Readiness for college level courses	GOAL: Completion of courses required for admission to Degree programs	GOAL: Completion of Degree or Diploma program
1991 Fall Enrollment:	68	46	25	53

"We started by surveying the members and the employer to find out what the employer's needs were and what the members wanted. Because so many of our members are Hispanic, English as a second language is one of our most important programs."

that worker may need two or more years of basic skills before being able to pass the state exam.

English as a Second Language (ESL)

ESL programs are always a success in terms of participation and results. The students are highly motivated and accomplishments are easily measured.

Because of this, union leaders often offer an ESL class before the rest of their program is planned out. Beware of creating divisions within the membership between recent immigrants and possibly more senior workers who want basic education or job training. Some locals have heard complaints of reverse discrimination and special privileges when they have arranged for release time for non-English speaking students to attend language classes. In this situation, it's doubly important to negotiate in advance questions of who carries the additional workload and how those who aren't receiving training are going to benefit.

One local decided to sequence their classes to delay offering ESL even though the need was obvious. Problems arose when students who wanted to learn English enrolled in the general reading/writing class that was offered. It split the class into factions and made it difficult to instruct.

All of these problems can be avoided by adequate planning. If you have the luxury to offer two classes at once, offer one in ESL and one in either reading and writing or math skills. If this is not possible, advertise an entire year of classes (or

BEST COPY AVAILABLE

"We have a program for people who just want job skills, not necessarily an 'education.' You want to be a lab technician? Here's a lab; here's what you have to learn for that job."

"But I Already Speak English!"

ALERT

Locals can face a sticky situation when a prospective student insists that he or she speaks enough English to attend a more advanced course, even though it's clear to the pre-placement interviewer (and the employer) that this is not true. This is one situation where a test may be in order.

One employer requires that employees be able to "read and write at a sixth grade level and understand and communicate in English, as well as be understood, in order to complete forms and comprehend their assignments and instructions."

The local union's ESL programs need to take these types of requirements into account.

at least two cycles), so that members can see when something they want is scheduled to be offered.

When you are planning, remember that there are levels in ESL, just as there are in Basic Skills. Some members may be much more conversant in English and just need some specific, job-related vocabulary, while others may be not be very literate even in their own language.

One local union turned its multilingual membership into an advantage, working with the employer to train members in ESL while preparing them for work as translators for their clients.

Job Training

Many local unions have decided to provide job skills training for members. These training programs generally address the needs of three categories of workers: members who need to maintain their current jobs or do them better; members whose jobs have changed, either because of the introduction of technology or reorganization; and members who wish to upgrade their skills and advance up the career ladder.

Increasingly, as American corporations begin to reorganize, downsize, or focus on the skills of the workforce, they introduce training programs of their own or rigid skills level pre-requirements. Local unions have only three choices: go along and take what the company decides to offer, cooperate and build something which fits the members' needs, or set up something of their own.

Some local unions, particularly building service locals, have set up their own training programs, providing a pool of skilled workers for grateful employers. Healthcare locals have found that the rigid certification requirements and the need for highly technical lab settings for hands-on training have made it necessary to work in close cooperation with the employer, who often has in-house staff experienced in Allied Health training.

Career Ladders

Career ladders are charts or descriptions of all the jobs in a particular facility, along with their skills and educational requirements.

By studying the career ladder, workers can know where their current qualifications can take them and also see what skills and education they must acquire if they want to upgrade.

Career ladders are usually developed by a joint committee of workers and employers. It's a time-consuming task, involving discussing every job classification with every department manager and steward in order to define job requirements objectively, clearly and realistically.

Career ladder committees also work to develop contract language on job posting; education benefits such as tuition reimbursements, leaves of absence, and release time; and other issues relating to job upgrades or career mobility.

Having well-thought-out career ladder programs can help provide a skilled, motivated and productive workforce for the employer, and employment security, promotional opportunities and job satisfaction for employees.

Sample Career Ladder (Maintenance Engineer)

DEPARTMENT	GR	TITLE	FUNCTION	JOB REQUIREMENTS	EDUCATION
Maintenance/Engineer	003	Groundskeeper	Mows lawn, weeds, plants and fertilizes lawn; assists in doing some maintenance department work such as retrieving supplies/equipment, light project-support work, etc. (especially when it rains)	Must be 18 yrs. of age or older, able to work in physically demanding position with stamina and function outside in in summer heat.	Ability to read, write and follow written and oral directions at 8th grade level
Maintenance/Engineer	006	Maint. & Eng. Secretary	Performs all secretarial and clerical as well as other administrative functions in department.	Ability to type at 50 WPM, dictation, transcription, record keeping, bookkeeping skills and basic computer knowledge.	Ability to read and write at 12th grade level.
Maintenance/Engineer	006	Maint. Helper	Assists general maintenance person in the maintenance and repair of physical plant and environmental services. Serves as a groundskeeper and performs general maintenance duties.	Mechanical aptitude and hand tool knowledge necessary, to be confirmed by testing. Hand/Eye coordination and mechanical skills required. Ability to work in extremely hot or cold areas, confined areas, tunnels, heights, frequent lifting, and on feet for extended periods of time.	Ability to read, write and follow written and oral directions at 12th grade level.

DEPARTMENT	GR	TITLE	FUNCTION	JOB REQUIREMENTS	EDUCATION
Maintenance/Engineer.	008	Painter	Performs painting and select repairs of physical plant.	Mechanical aptitude, working at heights and on feet for extended periods of time. One year painting experience or comparable demonstrated proficiency and speed.	Ability to read, write and follow written and oral directions at 12th grade level.
Maintenance/Engineer.	010	Maintenance Mechanic	Maintenance and repairs of physical plant and environmental services.	Two years maintenance or millwright experience including experience in plumbing, welding (electrical and ARC), and minor carpentry work. Working in extremely cold or hot areas and lifting required.	Ability to read, write and follow written and oral directions at 12th grade level.
Maintenance/Engineer.	012	Operations Mechanic	Maintenance, installation and major repairs of A/C units, nurse call and fire alarm systems, as well as duties of Maintenance Mechanic.	Minimum 5 years Maintenance Mechanic experience with a strong background in A/C or fire alarm, nurse call, paging and other similar systems. Must be able to read blueprints and electrical schematics. Work in extremely cold or hot areas and safely lift required.	300 hours of advanced course work in electrical or HVAC related subjects.
Maintenance/Engineer.	015	Carpenter	Maintains and repairs physical plant. Constructs and finishes or refinishes furniture, bookcases, cabinets. Builds new structures.	Minimum of 3 years construction experience. Must include 2 yrs. class A type building and renovation & finish cabinets. May work indoors or outdoors anytime of year, heights, hot and confined areas or tunnels. Must be able to interpret blueprints and follow building codes.	Vocational training in carpentry.
Maintenance/Engineer.	015	Electrician	Maintains and repairs physical plant and environmental services, performs major or minor electrical work.	Minimum of 4 years contruction of type class A building or equivalent. One year of experience must include hospital-related wiring. Must have current Mass. journeypersons' license. May work in extreme hot or cold areas, heights and confined areas.	Minimum 2 years vocational training in electrical related subjects.
Maintenance/Engineer.	015	Mechanical Tech.	Maintains and repairs physical plant and environmental services and all major mechanical installations.	Minimum 8 years as millwright and mechanics experience to include HVAC, boilers and life support equipment. Must have minimum of 2nd class fireperson license and pipefitting license. Ability to work in hot or cold confined areas and safely lift required. Must be able to run a variety of equipment.	2 years vocational training in mechanical field (combination HVAC, fireperson, pipefitter, welder, etc.)

SAMPLE PROGRAM #1

Career Ladder Training: Basic Ed Through Apprenticeship

Goal: To prepare low-wage hospital employees to upgrade to higher-paid skilled positions by offering workplace-based learning and training opportunities. The program is designed to improve general education levels as well as to provide access to college-level training. An additional goal is to help students overcome barriers which may limit class participation.

Funding: A two-year demonstration grant from the Massachusetts Department of Medical Security. Annual budget: $350,000.

Partners: SEIU Locals 285 and 767 and nine public and private hospitals statewide.

Labor-Management Committees: Joint committees at each hospital work to establish model career ladder/lattice opportunities. Committees consist of hospital personnel staff, nursing education staff, front-line supervisors, stewards, senior practitioners, and union staff.

Curriculum Design: Course work is modified by a partnership of community colleges to match the needs of the worker/student participants. Allied health certificate programs are adapted to the apprenticeship model.

Trainee Selection: The trainees are selected by a combination of community college entrance exams, seniority, and union and management interviews.

Educational Components:

1. **Basic worker education** — ABE, GED and ESL courses to help reduce linguistic and educational barriers which limit participation in additional training programs.
2. **Pre-internship preparation** — A combination of certificate programs and medical terminology courses to be offered to employees at the worksite for college credit. This course work is designed to help prepare workers for enrollment in the internship program.
3. **Internship** — Workers are selected from each hospital as interns to complete a combination of workplace-based training/apprenticeship and formal education to gain their Associate's Degree and promote into Medical Radiographer Technician and Physical Therapy Assistant positions.

The employer offers 50/50 release time.

Evaluation: The program contracted with the University of Massachusetts College of Public and Community Service to evaluate the program in terms of strategy, participation, and success rates.

WHAT IS CERTIFICATION AND WHO NEEDS IT?

Before you set up your training program, be sure that the members who participate in it will be able to benefit from it fully. Ask yourself if they need to be certified in any aspect of their jobs and make sure that your program is certified by that credentialling agency — and that may be very complicated.

For example, custodians in New York City must be certified by the Fire Department if they work with boilers or air conditioning equipment, so their training curriculum must be approved by the Department.

In health care, nearly everyone must be certified, from CNAs to LPNs to RNs, and the curriculum must be approved by the state. In addition, each profession will have its own certifying agency, such as the Physical Therapy Association and, ultimately, the AMA.

Despite the difficulties with certification and assessment, many local unions have wanted to be directly involved in job training — developing programs which benefit their members and protect their interests. Because most standard training programs are not designed for the person working full-time and raising a family, unions can help develop alternatives which are more responsive to workers' needs.

One local union developed a curriculum which turned a traditional classroom program into one which could be done on the member's own time and at the member's own pace, with guidance and direction from a mentor, another member who already held the job being trained for. Another local union has taken a training program which used to require years of outside study while working and turned it into a program with limited classroom study and an emphasis on on-the-job training.

Think creatively — you will often find the employer agreeing and wishing they had thought of it first.

WHO CAN PROVIDE THE SERVICE?

Once you've determined which type of training you want to offer, the next task is to decide how to deliver it: as a union-run program, an employer-sponsored training class, or a course offered by an established community college or other academic institution.

The option you choose depends on your funding, the time and staff you have available, your relationship with the employer, and the needs, capabilities, and interests of your members.

If the union is providing the service, you must determine if you want to hire teachers directly or contract through a community-based organization or community college for their teachers.

Community Colleges

Community colleges can provide credits, expertise, lab space, instructors, and general program assistance. Students can take isolated courses, such as basic literacy, or a series of classes aimed at getting a degree.

Programs offered through community colleges are not without problems, however.

▶ **You usually have to deal with an academic hierarchy,** which is often very conservative. Be prepared to take the time to argue the union's point of view about course content or direction. Do not be intimidated — much of what we know about worker education is pure common sense, and you know your members better than the college does.

BEST COPY AVAILABLE

▶ **Instructors may need special orientation** to provide appropriate training for workers, who are not their traditional students. They may not be experienced in working in a worksite, for example, or with work-based materials, and the concept of cooperating with the workers to develop a program, rather than just doing something for the workers, will probably be a new idea. (See "The Educators," page 13.)

▶ **Turf problems** between competing schools or departments can arise. Each department guards its right to offer certain programs and courses, as does each school. Many of them use certification to maintain control; your program may suffer as a result. Make sure you are both very clear from the beginning as to who exactly will do what work and offer what courses.

As in every other aspect of planning, your relationship with the community college should be worked out in detail, in advance, and in writing. Any arrangements should include the supervisors and the instructors — not just the chancellor or other top manager of the institution — because they're the ones who will make the program succeed or fail.

The issue of accreditation needs to be dealt with up front. You do not want your members to get into the position where they are taking courses and working in a program that may not give them the credits they need for certain certifica-

Sample Cooperative Agreement

COOPERATIVE AGREEMENT
December 8, 1988

This serves as a joint agreement between the following:
1. CT State Department of Labor (Labor Dept.)
2. Connecticut Valley Hospital (CVH)
3. Middlesex Community College (MXCC)
4. New England Health Care Employees Union, District 1199; and The Connecticut Nursing Homes Training & Upgrading Fund (Training Fund)

The above listed parties agree to establish a training program for dislocated Nurse Aides. The program will begin January 3, 1989 and end April 21, 1989, at which time those participants who have successfully completed the training shall be employed as Nurse Aides at CVH, during which time training shall continue and be provided by CVH, leading to the participants' placement into permanent Mental Health Worker positions at CVH as participants become qualified. Specific details of the conditions of employment of program participants is contained in the agreement between District 1199 and Connecticut Valley Hospital.

In the event the durational nurse aide positions are not approved by the State, CVH will make every effort to reclassify and utilize existing vacant permanent positions in which participants would work and continue their training.

The Cooperative Agreement will detail the responsibilities and role of each party.

CONNECTICUT VALLEY HOSPITAL

1. **Host Training Program:** Provide classroom space, storage space, class materials, and available educational resources.

2. **Provide Clinical Training:** Provide clinical training and assign a coordinator to oversee clinical component of training. Coordinate clinical training with Middlesex Community College and Training Fund Staff.

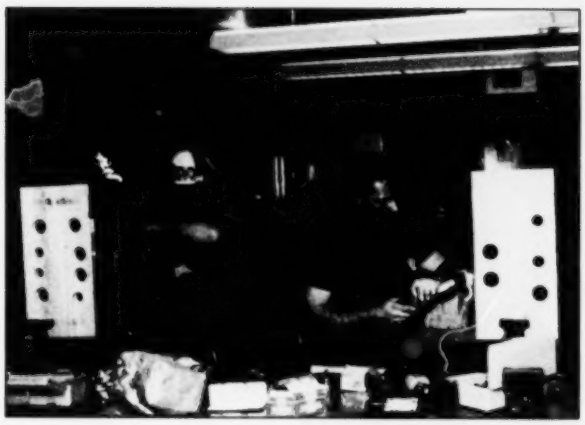
3. **Create Nurse Aide Positions:** Create Nurse Aide positions to be effective April 24, 1989, while working as Nurse Aides, program participants will receive further Mental Health Worker Training.

4. **Placement of Program Participants:** Place program participants, upon completion of the training, into permanent full-time Mental Health Worker positions in accordance with the agreement between District 1199 and CT Valley Hospital.

NEW ENGLAND HEALTH CARE EMPLOYEES UNION, DISTRICT 1199, AND THE CONNECTICUT NURSING HOMES TRAINING AND UPGRADING FUND

1. Provide the overall coordination and communication between all parties.

2. Provide Training Scholarships to program participants in the amount of $50 per week during the course of the training program, January 3, 1989, to April 21, 1989.



tion. Most developmental classes are not for credit, so find out before they begin and be clear with the members. Other credits may not be transferable — a Rad Tech program in one school may not be recognized by another, or by an employer. Additionally, credits are one of the hidden costs of a program. Many a local union program has contracted for classes and then discovered that each student must pay again for credits. Be sure you know what you are getting before you sign on.

There are many different ways to structure payment for college credits. It's not always a fee for each credit. The union can "purchase" the instruction with a set fee to the instructor or the college regardless of how many students participate.

Another method is to allocate a certain amount of money that reimburses the college for the instructor — not for administration or for credits per se.

Or you can work out a quid pro quo — for joint programs — in which the employer contributes the trainer and the college offers the credit.

PLANNING YOUR CURRICULUM

The most important thing to remember when designing a curriculum is not to leave it to outside "experts" — education consultants or community colleges, for example — to develop. While there are classic models for class content that you can refer to, the most effective education programs have been developed with direct input by the union and by workers themselves. This is often done by setting up a curriculum committee, either as part of the advisory committee or separately.

Tasks of the Curriculum Committee

1. Develop work-based course content
2. Set up guidelines for instructors
3. Determine assessment tools and procedures

One local's curriculum committee consisted of instructors, learning advocates, counselors, and the union rep. It met every other week. Another curriculum committee divided into two subcommittees — one to develop course content for specialized health training and the other geared toward adult basic ed and college prep.

The curriculum committee should

"The curriculum is where the power is for getting what you want."

Sample Curriculum (Refrigeration Machine Operator)

REFRIGERATION MACHINE OPERATOR LICENSE — 200-Hour Course of Instruction (Partial List)

Texts

Refrigeration, Minnesota State Association, National Association of Power Engineers, 1969

Modern Refrigeration and Air Conditioning, Althouse and Turnquist (Goodheart-Willcox Co., Chicago, IL, 1978.)

Industrial Refrigeration Course (I and II), (Refrigeration Engineers and Technicians Association, Chicago, IL).

NYC administrative Code (Local Law 76) — "Refrigeration Code"

Unit	SUBJECT	Hours
1	Introduction to the Course, Registration procedures, tools, problems, rules of the school	2
2	Refrigeration Systems. The Refrigeration Cycle	2
3	Review of Refrigeration Cycle. Classification and type of systems	2
4	Thermodynamics Nature of heat, effects of heat energy, molecular theory of heat, temperature and heat	4
5	The Gas Laws Dalton's Law, Boyle's Law Problems of pressure, temperature, volume	4
6	Refrigeration Mathematics	4
7	Temperature Measurements—various temperature scales. The British Thermal Unit and measurement of heat content. Specific heat and latent heat—humidity, absolute zero	4
8	Refrigerants—Qualities and Properties	2
9	Effects of Moisture/Moisture Removal Dessicants and driers. Specific heat.	2
10	Refrigerant Tables and Data. Pressure and vacuum. Effects of pressure and temperature on gases. Problems to calculate refrigeration effect and use of data	4
11	Heat Transfer. Conductors and insulators. Calculation for heat conduction	2
12	Refrigeration Oils and Lubrication. Qualities and characteristics of lubricants and oils	2
13	Methods of Lubricating Compressors Lubricating systems and components, filters, pumps, etc.	2
14	Refrigeration Compressors—a general discussion	2
15	Serviceable and non-serviceable Hermetic Compressors	2
16	Vertical ammonia recriprocating compressors	2
18	High-speed Freon Compressors	4
19	Centrifugal Compressors	2
20	Methods of capacity control of centrifugal machines	2
21	Capacity control of reciprocating machines	2
22	Rotary compressors and other types	1
23	Condensers and cooling towers Construction and operation of air-cooled condensers	1
24	Theory, operation and maintenance of water-cooled condensers,types of condensers and heat transfer	2
25	Cooling towers and spray ponds	2
26	Receivers, filters and driers—Evaporators/Coolers	4
27	Metering devices	4
28	FIELD TRIP to a refrigeration valve manufacturer	6
29	Purgers, ammonia mixers and safety devices	2
30	Discussion of the basic refrigeration plant	2
31	FIELD TRIP to a modern, central air-conditioning plant to physically orient the students with the equipment and components studied up to this point	6
32	Brines and secondary refrigerants. Holdover tanks, congealing tanks, circulating pumps, operation and maintenance of brine systems. Discussion of PH	4
33	FIELD TRIP to a modern air-conditioning plant equipped with centrifugal compressor	6
34	Local 76, The New York City Refrigeration Code	4
35	Non-Compression Systems Ammonia Absorption Systems	4
36	Lithium-bromide Absorption Systems	2
37	FIELD TRIP to a lithium bromide plant	6
38	Steam jet and thermocouple systems	1
39	How to calculate compressor capacity, volume, displacement, compression ratio, horsepower requirements, amount of refrigerant to be circulated	4
40	This unit consists of 47 hours of intensive preparation for the written examinations for Refrigeration Machine Operator. Drills and examinations based on past tests will be used	47

SAMPLE PROGRAM #2

An Upgrading and Career Ladder Program

Goal: Labor and management [in this case, SEIU Local 6 health care workers and their employer, Group Health Cooperative (GHC) of Puget Sound, Washington state] working together to upgrade the skills of currently employed workers by creating a flexible and adaptable system of "structured work-based learning" that integrates on-the-job training with theoretical instruction.

Funding: A grant from the U.S. Department of Labor that grew out of the DOL's "Apprenticeship 2000 Initiative." Annual budget: Approximately $100,000.

Staff: Full-time director with adult education background. A substantial time commitment was made by the local union business agent for Group Health.

Labor-Management Committee: The labor-management steering committee includes the union rep, medical assistants (position being trained for), nursing administration, a rep from Human Resources, and a facilitator. The committee meets at least once a month. The medical assistants have been involved in all parts of the program, including development of basic skills assessment and interviewing.

Job Analysis: The DACUM (Develop a Curriculum) process was used. DACUM is based on the premise that expert workers can define and describe their job more accurately than anyone else.

Curriculum Design: A consultant wrote the curriculum using the information from the DACUM, interviews, observation, and surveying established curriculum. The curriculum is job-specific — centered around what a medical assistant at GHC needs to know.

Trainee Selection: Over 140 employees applied for ten positions. Six more slots were opened, and 16 trainees were selected. Factors in choosing were 1) interview scores, 2) basic skills assessment, 3) personnel file, 4) minority distribution, and 5) geographic distribution. A waiting list for the next series has been established.

Training: The 15 weeks of training include 90 classroom hours, 54 laboratory hours, and 108 clinical hours (with a preceptor). Training in basic study skills has also been provided. Trainees will receive 15 college credits under a program entitled "Group Health Cooperative Clinical Assistant." Classroom and laboratory time is on the employees' own time. Clinical time is on payroll. Preceptors (mentors) receive an additional 55 cents an hour when precepting.

Evaluation: The Northwest Regional Educational Laboratory is doing an evaluation of the project for the Department of Labor. GHC will be doing three, six, and twelve-month evaluations of how trainees perform once actually hired as medical assistants.

Problems: This program was initially set up without an active and involved advisory board. The director and the business agent had to meet with all parties several times and found that their effectiveness was seriously hampered. Once a labor-management committee was formed to oversee this project, everything began to run smoothly.

establish from the very beginning that any program they develop will be owned by all parties. Get this in writing in a letter of understanding. Some local unions have found that teachers, in particular, are very reluctant to share their curriculum — they consider it their property. You want to be able to use it again in your future classes and possibly share it with other locals.

Remember, the curriculum is the center of the program — it is what the participants learn and how they will learn it. A poorly designed curriculum may insult or intimidate your members and turn them off; a well-designed curriculum will empower them and make learning a rewarding experience.

CHOOSING THE LEARNERS

There are as many ways of choosing participants as there are types of programs. Eligibility often depends on who's paying for the program.

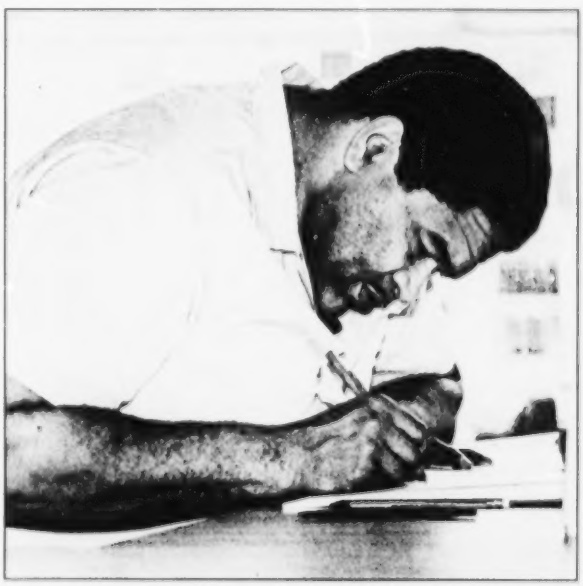
When it is up to the union and the employer to choose participants, it can become a painful and counterproductive political process. One thing you must be sure of is that the criteria are clear and that all members understand the process.

Sample criteria for selection:

- interview scores
- geographic or minority distribution
- basic skills assessment
- personnel file
- jobs that will be created in the future that need to be filled
- requirements by the grantor or the community college
- seniority
- length of union membership

Pre-placement Tests and Assessments

Testing. Generally thought to be the least successful method of determining a student's placement, testing is sometimes unavoidable. If students are being prepared for technical jobs or particular college courses, they may need to take a preliminary test beforehand in order to determine if they can handle the material. Funders also often require comparative test results to gauge the success of the program and decide whether to continue their financial support.



"The problem with tests is that often they judge only very specific kinds of knowledge and are given in an anxiety-producing atmosphere. They measure test-taking skills more than anything else."

When testing is necessary, be aware of different tests' deficiencies. Sometimes test results measure only how good someone is at test-taking. Tests can be culturally biased. Reading tests judge only very specific skills and language — sometimes not even those necessary to successfully perform a job. Time limits for completing tests make students nervous.

As one local union leader reported, "A lot of our people will not finish a test within the time limit. But when they go to

Sample Questions from the Kind of Test to Avoid

The Purpose of the Tests

The Computerized Placement Tests (CPTs) were developed by the College Board, with the help of committees of college professors, to provide information about the reading, English, and mathematics skills that are required for success in college. By assessing your ability levels in these areas, the CPTs help to determine the English, mathematics, and reading courses most appropriate for you at this time.

Test Administration

The Computerized Placement Tests are administered on a personal computer. You will actually read the instructions and questions on the computer screen and will mark your answers using the computer keyboard.

Sample Question for Reading Comprehension

Read the statement or passage and then choose the best answer to the question. Answer the question on the basis of what is stated or implied in the statement or passage.

Myths are stories, the products of fertile imagination, sometimes simple, often containing profound truths. They are not meant to be taken too literally. Details may sometimes appear childish, but most myths express a culture's most serious beliefs about human beings, eternity, and God.

The main idea of this passage is that myths

a.) are created primarily to entertain young children

b.) are purposely written for the reader who lacks imagination

c.) provide the reader with a means of escape from reality

d.) illustrate the values that are considered important to a society.

Sample Mathematics Questions

1. Which of the following is closest to $\sqrt{10.5}$?

a.) 3 b.) 4 c.) 5 d.) 8

2. Three people who work full time are to work together on a project, but their total time on the project is to be equivalent to that of only one person working full time. If one of the people is budgeted for ½ of his time to the project and a second person for 1/3 of her time, what part of the third worker's time should be budgeted to this project?

a.) 1/3 b.) 1/4 c.) 1/6 d.) 1/8

class and are in a relaxed atmosphere, their comprehension is above what the test scores say. So we use tests only as an initial indicator. The instructor can evaluate whether the student has been placed at the correct level after working with them for a while."

Another program leader described their solution: "Our local developed a test — not really a test because it's verbal and done in one on one conversation — based on workplace knowledge, like specific vocabulary and language. It uses words that you know the workers know and problems you know they have been confronted with. It takes a long time to do, but you end up with an incredibly accurate picture of where people are on their math skills, their comprehension skills, and so forth. You don't have to worry about the things that make other tests so bad — cultural differences and time limits, for example."

A number of assessment techniques can be used instead of testing to place students into appropriate classes or to measure how much they've learned from the program.

Interviews. Confidential, one-on-one interviews can help instructors or learning advocates make an initial assessment of learning needs. These discussions can include brief reading or writing exercises — filling out an application form, for example — that take the place of standardized tests.

One local union compiled a list of

what a worker needs to know to perform a particular job. Counselors work through that list in an interview, after which both the student and the counselor have a clear idea of what the student knows and what he or she needs to learn. Going through the list after the class is completed helps determine whether the student has been successful.

Another local incorporated assessment interviews into their sign-up drive. Learning advocates talked with prospective students for 10 or 15 minutes about what the program had to offer and what the students felt they needed to learn.

Selection of Participants for Job Training or Upgrades

In job training programs, the employer may be in the best position to anticipate future staffing needs and should have a role in selecting categories of workers to be trained for those jobs. Being able to select those classifications also may give the employer a reason to allocate resources to the program — trained workers and a loyal, stable workforce are the payback. However, under no

circumstances should the union allow the employer to actually select the individuals to be trained.

All discussion about who should be trained for open positions should take place in the context of a career ladder plan for the entire bargaining unit. When such a system has been bargained, everyone knows who is eligible for what position and how much training and experience is required to do the job. (See "Career Ladders," p. 24.)

Seniority

With the future in mind, employers will often agree that selection should be based on seniority. They feel that more senior people are more likely to be committed to the education process and to stay on the job after they are trained.

Seniority can be considered a "neutral" system — easily understood and hard to dispute. However, it's important to ensure that seniority doesn't develop into favoritism and that qualifications still matter.

One local developed an alternative "neutral" selection method by establishing a point system. Points were given for longevity, for how many classes the students had previously completed, and for ongoing participation in a class.

"Everyone knew what the point system was and how to get into it," says that local's leader. "No one could claim it was based on seniority or favoritism."

Even when management suggests the participants or performs the actual training, it's crucial that the union get the credit for making the program available. Make sure that whoever moves up as a result of job training recognizes that the union made that upgrade possible. (See "Credit Where Credit is Due," p. 41.)

With job training programs in particular, because they often involve on-the-job training or release time, there are a number of other issues that must be considered when deciding who gets trained and when. Before the training begins, make sure you have worked out the following issues, if they are not already in the contract:

- Will the trainee get a training wage if training in a higher job classification? When will the higher wage rate go into effect?
- If the mentor or trainer is a worker, will he or she get lead differential pay?
- What is the exact classification of the new position?
- Who will do the work of the trainee when he or she is off being trained?

GED or High School Diploma

Programs presented in cooperation with community colleges often have criteria that the union cannot control, such as prerequisites for completion of certain lower level courses or even a high school diploma or equivalent.

RECRUITMENT

A successful program is often its best advertisement — students are informed by word of mouth. But there are occasions, such as when a program is just getting underway, that the local union must actively recruit participants.

Recruiters must be able to establish what benefits the student will derive from taking the course — such as a wage increase, a job upgrade, or simply reaching a personal educational goal. However, it's important to train recruiters to present the course in a way that doesn't make students feel inadequate for hav-

Sample Participation Agreement

WORKER EDUCATION PROGRAM

PARTICIPATION AGREEMENT FORM

It is understood that _____ will serve as Intern in the Medical Radiography program as part of the Worker Education Program at _____ Hospital.

While the program start date is _____, both the Intern and Hospital understand that completion of the degree will take a minimum of two to three years depending on the individuals educational background. During this time, the hospital will provide the Intern with an average of 50% paid release time. Paid release time in this agreement is calculated at 50% of an Interns regular work week hours. The employee will complete all assigned courses and clinical placements as determined by Bunker Hill Community College, and continue to provide satisfactory job performance in their current hospital position.

Upon successful completion the employee will have an Associates Degree in Medical Radiography and be ready to take licensure and certification exams. All job placement will continue to be made in accordance with the provision of the collective bargaining agreement. An employee's current full-time job will not be jeopardized by his/her participation in the Worker Education Program. This holds if the employee voluntarily withdraws or if the program ends.

In compliance with tuition reimbursement contract language, for every year enrolled in the Internship Program, the Intern will owe one year of employment to the hospital. Employment as a Medical Radiography Technologist or in one's current position will fulfill this requirement. If no RT position becomes available within three (3) months of the Interns' Associate Degree completion, the Intern will no longer be obligated to remain at the hospital.

Due to the unique nature of this program's funding, it is understood that the Hospital agrees to participate in good faith in the project through December, 1992 for abovementioned Intern. If at that point, additional funding is not found, the Hospital, the Union, the Intern and Bunker Hill Community College are committed to working together to secure alternative possibilities for the Intern to successfully complete their degree. If future funding is found the Hospital will continue participating until the Intern completes his/her degree.

I, _____ understand and accept the terms of this program and will work in good faith to complete the Associates Degree in Medical Radiography.

Employee _____ Date _____

WEP Union Liaison _____

WEP Hospital Liaison _____

Department Head/Supervisor _____

Union Steward _____

WEP Program Director _____

BHCC Academic Project Director _____

Sample Registration Form

SERVICE EMPLOYEES INTERNATIONAL UNION

WEP

WORKER EDUCATION PROGRAM

reg-form

WORKER EDUCATION PROGRAM

REGISTRATION FORM

Course Title: _____

PLEASE FILL THIS OUT TO THE BEST OF YOUR ABILITY. IF YOU DON'T KNOW THE ANSWERS TO SOME OF THE QUESTIONS, LEAVE THEM BLANK.

Hospital: _____ Today's Date: _____

Name: (Please print) First: _____ Last: _____

Address: _____

City _____ State _____ Zip _____

Home Phone: (__)_____ Work Phone:(__)_____ Ext.:____

Social Security Number: _____ Sex: Male or Female

WORK HISTORY

Department:_____ Present Job Title: _____

Job Grade: _____ Number of Hours I work per week: _____

Length of time in current position: _____

Shift I Work: From:_____am or pm? To:_____am or pm?

Salary: (hourly) _____ (weekly) _____

First Line Supervisor: _____ Ext.:_____

PREVIOUS POSITION(S) HELD AT HOSPITAL:

(1) Job title: _____ Length of service: _____

Grade: _____ Salary: (hourly) _____ (weekly) _____

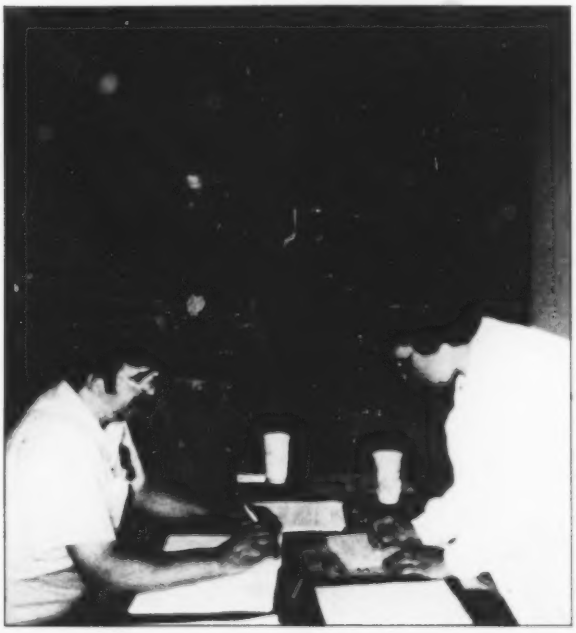
(2) Job title: _____ Length of service: _____

Grade: _____ Salary: (hourly ____ (weekly) ____

EXPANDING CAREER LADDERS FOR HOSPITAL WORKERS

Harmeen Chinnow, Program Director
SEIU Local 285, 145 Tremont Street, Boston, MA 02111
(617) 422-0033

A JOINT LABOR MANAGEMENT PROJECT OF
SEIU LOCAL 767 1-800-287-0767
SEIU LOCAL 285 1-800-882-1467



Are you a union member? Yes ___ No ___

If YES, what is the name of your union? _____

Who is your union steward? _____

Native Language: _____

EDUCATION

Highest Grade Completed: _____

Have you received a High School Diploma? Yes ___ No ___

Have you received a GED? Yes ___ No ___

List any other courses or training programs you have enrolled in at your Hospital: _____

College Courses taken (Please list): _____

_____

Have you attended any additional training programs? Yes___ No___

Name of Program: _____

Dates Attended: _____ Did you Graduate? Y ___ N ___

ETHNIC BACKGROUND (check what applies):

___ African-American ___ Haitian

___ American Indian or Alaskan ___ Hispanic

___ Asian or Pacific Islander ___ White

___ Cape Verdean ___ Other _____

GENERAL INFORMATION:

1. Why did you decide to enroll in this course (check all that apply)?

___ to improve my job skills ___ to promote to another job

___ to continue my education ___ to better myself

___ to pursue a college degree or education

___ curiosity ___ Other _____

2. Please check future courses you would like to enroll in:

___ yes ___ no GED Prep Course
___ yes ___ no Adult Basic Ed-Math Course
___ yes ___ no Adult Basic Ed-English Course
___ yes ___ no Medical Terminology
___ yes ___ no Typing
___ yes ___ no Word Processing/Computer Course
___ yes ___ no College-Prep English Course
___ yes ___ no College-Prep Math Course
___ yes ___ no Business Math

List other courses you are interested in attending:

List any college degree or training programs you are interested in pursuing:

3. I prefer to have mail from the Worker Education Program office sent to me (circle one):

at home at work either place

4. I would like a letter/phone call confirming my enrollment in this class sent/made to my supervisor to assist with any questions or release time issues:

Yes ___ No ___

The following information is for documenting purposes only and, if given, will be kept confidential.

Date of Birth: _____ Marital Status: _____

Number of dependents living with you at home: _____

Are you a single head of household? Yes ___ No ___

To the best of my knowledge, all information given on this registration form is accurate. I agree to attend all classes and complete homework and other class assignments.

_____ _____

Signature of Worker/Student Signature of WEP Representative

_____ _____

Date Date

ing to take it. This is particularly true for basic skills courses.

Planners should try whenever possible to accommodate everyone who wants to participate, using waiting lists if necessary.

MAKING YOUR PROGRAM ACCESSIBLE TO THE LEARNERS

Sometimes recruiting students is difficult, even when it's a free benefit, because of scheduling. Program planners should take convenience into account when deciding when and where to hold classes.

Many unions establish a learning center at the union hall or other nearby site. Consider access to public transportation and try to provide child care or help make child care arrangements. Nearby community organizations may be able to help provide some services.

Having classes at the workplace may make them more successful, especially in attracting people initially. Unions should be make sure, however, that the union's involvement is made clear to the participants. Otherwise the employer will be credited with providing this service.

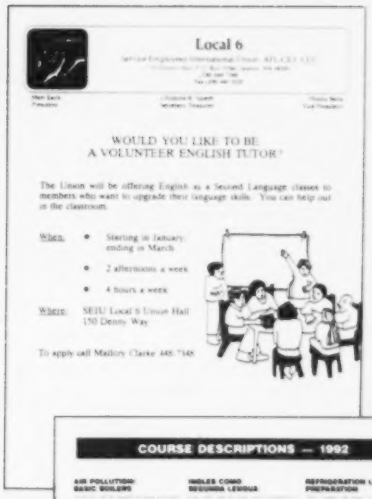
Some locals negotiate release time, paid or otherwise, so that workers can attend classes on company time. However, having release time privileges can sacrifice the workers' right to privacy, since employers usually require attendance reports. Concern has also been expressed that having release time can skew the course content towards job-specific training rather than broader educational goals.

ALERT

Don't Jump To Conclusions

Don't insult your members by assuming that they want to take a certain course only for job advancement. By presenting education as a chance to move into a higher position, you convey the message that their current job is undesirable.

From evaluations after the first year of their program, one local found that the number one reason people signed up for the course was to improve themselves in their current position rather than to move up a career ladder or get college credit. Some of them just wanted to be able to help their kids with schoolwork.



Local 6

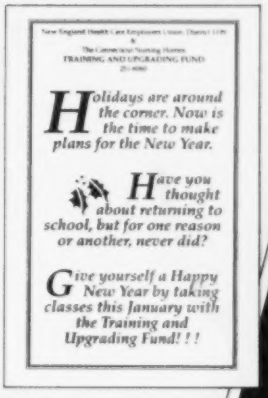
WOULD YOU LIKE TO BE A VOLUNTEER ENGLISH TUTOR?

The Union will be offering English as a Second Language classes to members who want to upgrade their language skills. You can help out in the classroom.

When:
- Starting in January, ending in March
- 2 afternoons a week
- 4 hours a week

Where: SEIU Local 6 Union Hall 150 Denny Way

To apply call Mallory Clarke 448-7548

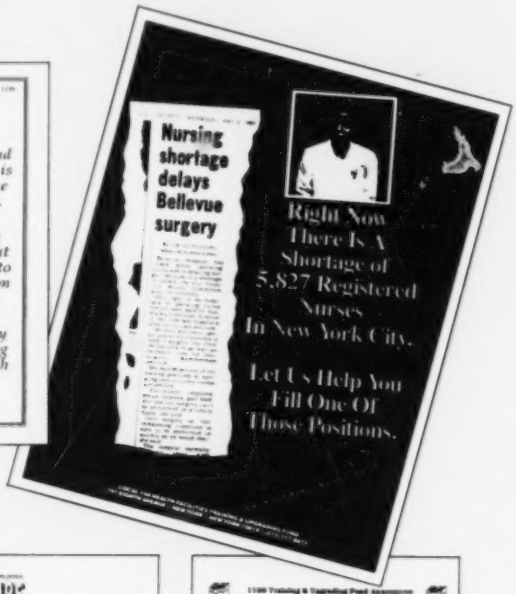


New England Health Care Employees Union, District 1199 & The Connecticut Nursing Homes TRAINING AND UPGRADING FUND 25¢ stamp

Holidays are around the corner. Now is the time to make plans for the New Year.

Have you thought about returning to school, but for one reason or another, never did?

Give yourself a Happy New Year by taking classes this January with the Training and Upgrading Fund! ! !



Nursing shortage delays Bellevue surgery

Right Now There Is A Shortage of 5,827 Registered Nurses In New York City.

Let Us Help You Fill One Of Those Positions.

COURSE DESCRIPTIONS — 1992

AIR POLLUTION: BASIC BOILERS

INGLES COMO SEGUNDO LENGUA

REFRIGERATION LICENSE PREPARATION

BURGLAR ALARM INSTALLATION & SERVICE

CUSTODIAN EXAM PREPARATION

REFRIGERATION REPAIR & SERVICE

ADVANCED BOILER

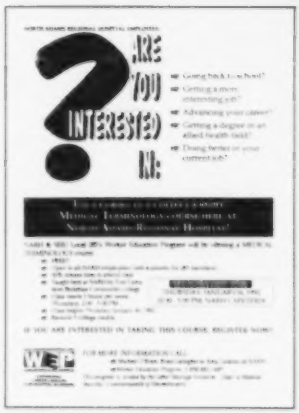
BUILDING MAINTENANCE

INTRODUCTION TO COMPUTERS

ENGLISH AS A SECOND LANGUAGE

FIRE PREVENTION EXAM PREPARATION

We Wish All Our Members a Happy, Healthy New Year!



ARE YOU INTERESTED IN:

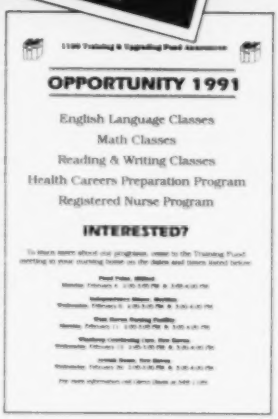
- Going back to work?
- Getting a more interesting job?
- Advancing your career?
- Getting a degree or an allied health field?
- Doing better at your current job?

MEDICAL TERMINOLOGY—CORE COURSE AT NORTH ADAMS REGIONAL HOSPITAL

IF YOU ARE INTERESTED IN TAKING THIS COURSE, REGISTER NOW!

FOR MORE INFORMATION CALL

WEL

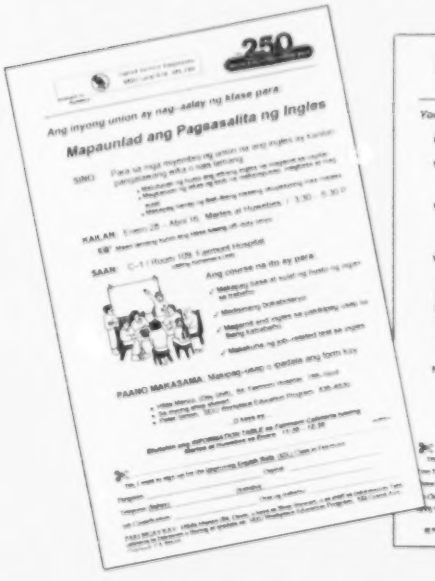


1199 Training & Upgrading Fund Announces

OPPORTUNITY 1991

English Language Classes
Math Classes
Reading & Writing Classes
Health Careers Preparation Program
Registered Nurse Program

INTERESTED?



250

Ang inyong union ay nag- aalay ng klase para

Mapaunlad ang Pagsasalita ng Ingles

SINO:

KAILAN: Enero 28 – Abril 16, Martes at Huwebes / 3:30 – 5:30 P.M.

SAAN: C-1 / Room 109, Fairmont Hospital

Ang course na ito ay para:

- Matapos basa at sulat ng hindi ng mga ka trabaho
- Madagdag ang kaalaman sa pagbabasa, sulat, at pag kakaintindi
- Maipunla ng job-related test sa ingles

PAANO MAKASAMA: Mangyag-usap o pasala ang form kay

- Hilda Marcos, (Day Shift), Fairmont Hospital, 788-1000
- Pat Hernandez, Medical Clerk, Emergency Room, (Day Shift)
- Peter Simon, SEIU Workplace Education Program, 835-4533

Ilagay sa

Dalhan ang INFORMATION TABLE sa Fairmont Cafeteria tuwing Martes at Huwebes sa Enero 11:30 - 12:30

Oo, I want to sign up for the Upgrading English Skills SEIU Class in Fairmont.

Pangalan _____ Ospital _____

Telepono (BAHAY) _____ (TRABAHO) _____

Uri ng trabaho _____ Oras ng trabaho _____

PARA SA IYO KAYO: Hilda Marcos (Day Shift), Linda or Rose Vincent, or mail or hand in this form to SEIU Workplace Education Program, 150 Denny Way, Seattle, WA 98109

250

Your Union is providing a course for :

Upgrading Reading and Writing Skills

WHO: Highland employees who want to:
- Improve their writing and spelling
- Brush up on reading skills
- Prepare for technical training

WHEN: Tuesdays and Thursdays / 3:45–5:45 PM

January 28 – April 16

WHERE: E–1 Conference Room (By Outpatient Pharmacy)

This course will focus on:
- Writing clear reports, memos, etc.
- Test-taking skills
- Reading materials used on the job
- Grammar, sentence structure, and spelling
- Understanding medical vocabulary

HOW TO SIGN UP: Talk with / give the below form to:

- Lavada Marcus, Housekeeping, Evening Shift
- Andrea Christensen, Medical Clerk, Emergency Room, Day Shift
- Peter Simon, SEIU Workplace Education Program, 835-4533

OR

Come visit the INFORMATION TABLE in the Highland Cafeteria Every Tuesday and Thursday 11:30 – 12:30

Yes, I want to sign up for the Upgrading Reading and Writing Skills Class in Highland.

Your Name: _____ Hospital: _____

Home Number: _____ (work): _____

Classification: _____ Work hours: _____

RETURN TO: Andrea Christensen, Emergency / Depts. Lavada Marcus (Housekeeping / Pat), Shop Steward, Night or Intermediate Table in cafeteria

or mail to: SEIU Workplace Education Program, 150 Denny Ave., Highland, CA 98121

250

Su sindicato le ofrece un curso:

Inglés Como Segundo Idioma

QUIEN: Miembros de S.E.I.U. para quienes inglés es su segundo idioma, y quieren quieren:
- Aumentar el inglés que se usa en el hospital
- Tener más confianza cuando US. habla, lee o escribe en inglés
- Tener acceso a más entrenamiento y trabajos diferentes

CUANDO: Cada martes y jueves / 3:30 – 5:30 PM

28 de enero – 16 de abril

NB* Trabajadores tomarán la clase en su propio tiempo, no en sus horas de trabajo.

DONDE: C–1 / Room 109, Fairmont Hospital

En esta clase el enfoque será:
- La lectura y escritura usada en el trabajo
- El vocabulario médico
- La gramática inglés
- Hablando inglés en varias situaciones
- Tomando momentos para el trabajo

COMO INSCRIBIRSE: Favor de entregar este formulario a:

- Hilda Marcos, trabajo de día, En Fairmont Hospital, 788-1000
- Su representante de unidad
- Peter Simon, SEIU, Workplace Education Program, 835-4533

O Usa Puesto

Visitar nuestra MESA de INFORMACION en la Cafeteria de Fairmont Cada martes y jueves en enero 11:30 – 12:30

Sí, quiero inscribirme a mi clase de Inglés Como Segundo Idioma en el Hospital Fairmont

Su nombre: _____ Hospital: _____

Número de teléfono: (casa) _____ (trabajo) _____

Clasificación de su trabajo: _____ Horas que UD. trabaja: _____

NVIE DE DEVOLVER A: Hilda Marcos (Dia, Turno), o su representante de unidad, o el personal en la Mesa de Información en la cafetería, o Fairmont 1118, puede mandarlo a: SEIU, Workplace Education Program, 150 Denny Ave., Highland, CA 98121

"We have to be a player — otherwise, we lose jobs. And we have to let the members know: 'You got your training, you got your job, because this union was here.'"

GETTING THE WORD OUT

You can publicize your education program by . . .

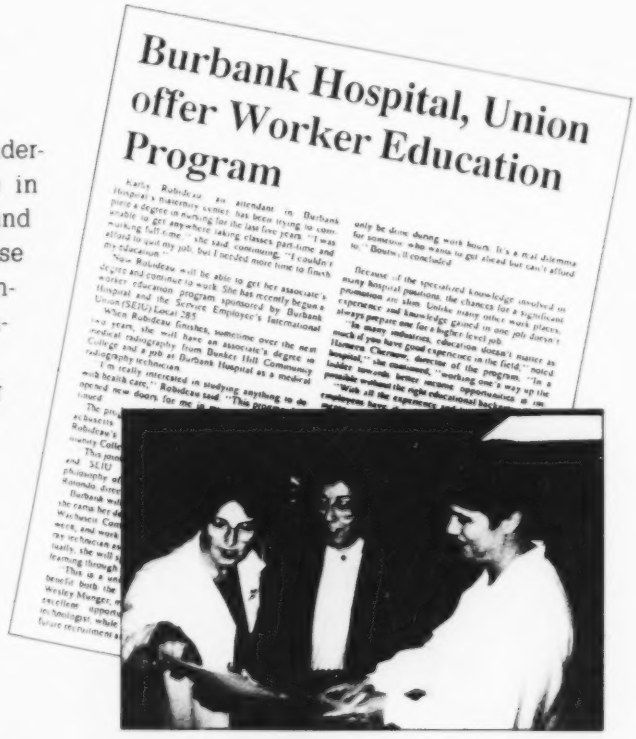
- posting announcements on bulletin boards
- stuffing flyers in paycheck envelopes
- mailing flyers to members' homes
- having stewards talk it up in each department
- putting announcements in the local newsletter or paper
- making presentations at union meetings
- asking managers to promote it
- setting up tables in the cafeteria
- setting up tables at the payroll office on payday

Locals have found that tangible results lead to more support for and interest in the program. For example, when a co-worker upgrades his or her job as a result of having taken a class, it shows other workers that this is worth the investment of time and energy.

Credit Where Credit Is Due

Make sure everyone understands the union's role in developing educational and career opportunities. These programs can build tremendous loyalty in the membership.

Use union letterhead for the project; put pictures of the classes and participants in the union newsletter; be present at the opening class and at graduation; be a visible part of the program.



Burbank Hospital, Union offer Worker Education Program

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POST-TRAINING ASSESSMENTS AND EVALUATIONS

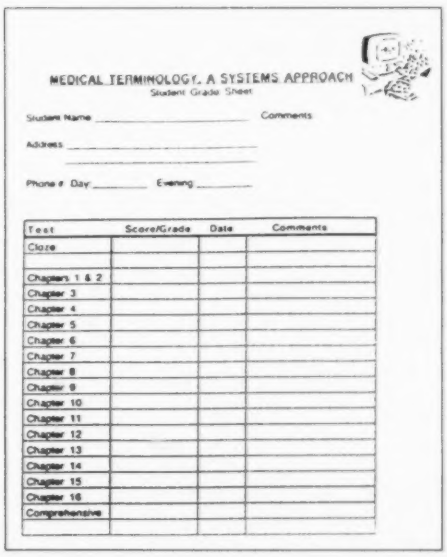
One of the trickiest questions any education program faces is how to determine the success of the training. The need for assessments and evaluations varies according to the type of training. College credit courses often have specific criteria, whereas basic skills courses — reading and writing — can be much more subjective and informal.

▶ **Interviews.** Counselors or learning advocates can meet with students after their training to compare the results with the assesments gathered in pre-placement interviews.

▶ **Portfolios or self-assessment.** This system works best in writing classes. Students are in charge of measuring their own progress by keeping assignments in a folder and writing down what they think about what they wrote. At the end of the course, they have a series of evaluation assignments and can assess the changes themselves.

Sample Student Checklist

A trainee who is working independently can use this checklist to keep track of his or her work. The mentor then goes over the checklist with the trainee to make sure work is proceeding satisfactorily.



MEDICAL TERMINOLOGY, A SYSTEMS APPROACH
Student Grade Sheet

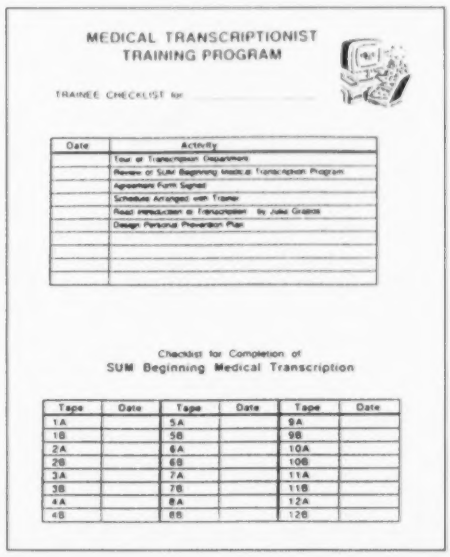
Student Name _____ Comments

Address _____

_____

Phone # Day _____ Evening _____

Test	Score/Grade	Date	Comments
Cloze			
Chapters 1 & 2			
Chapter 3			
Chapter 4			
Chapter 5			
Chapter 6			
Chapter 7			
Chapter 8			
Chapter 9			
Chapter 10			
Chapter 11			
Chapter 12			
Chapter 13			
Chapter 14			
Chapter 15			
Chapter 16			
Comprehensive			



MEDICAL TRANSCRIPTIONIST
TRAINING PROGRAM

TRAINEE CHECKLIST for _____

Date	Activity
	Tour of Transcription Department
	Review of SUM Beginning Medical Transcription Program
	Agreement Form Signed
	Schedule Arranged with Trainer
	Read Introduction to Transcription by Jules Gralnick
	Design Personal Preparation Plan

Checklist for Completion of
SUM Beginning Medical Transcription

Tape	Date	Tape	Date	Tape	Date
1A		5A		9A	
1B		5B		9B	
2A		6A		10A	
2B		6B		10B	
3A		7A		11A	
3B		7B		11B	
4A		8A		12A	
4B		8B		12B	

EVALUATING THE SUCCESS OF THE PROGRAM AS A WHOLE

Unions can conduct interviews with learners to find out how the participants themselves viewed the program. Discussions with supervisors can provide information on changes in the workplace that are attributable to the program, such as attendance, self-esteem, turnover, or improved technical skills. From these discussions, program planners can decide whether and how to adjust future training.

Outside evaluators are often a necessary evil of grant-driven programs — which require quantifiable results and costly recordkeeping. On the other hand, a good evaluator can be helpful in identifying problems and mistakes and suggesting ways to correct them to make the program better.

ALERT

Keep Tabs on Outside Evaluators

Evaluators who are constantly present in the workplace or classroom can intimidate students and trainees, sometimes even scaring them out of the program. Students have been known to drop out rather than have their reactions taped or detailed. Some fear they might lose their jobs if the evaluator reports low performance levels.

Sample Evaluator Contract

CONTRACT

This is a contract between the Northern California Joint Council of Service Employees #2 (hereinafter referred to as SEIU), 522 Grand Avenue, Oakland, CA 94610, and Northwest Regional Educational Laboratory (hereinafter referred to as NWREL), 101 S.W. Main Street, Portland, OR 97204, for the performance of work set forth below.

1.0 STATEMENT OF PURPOSE:

The purpose of this agreement is to provide SEIU technical assistance in planning an evaluation of the Health Care Skill Builders Program on an on-demand basis.

2.0 NWREL AGREES TO:

2.1 Provide the following technical assistance in the development of an evaluation process:

2.1.1 Together with representatives of the SEIU Workplace Education Program, analyze data from "Stakeholder" interviews and student evaluations to identify areas of consensus and to determine outcomes to be measured by the evaluation process.

2.1.2 Design Evaluation Plan for remainer of grant period (2-1-92 to 8-31-92).

2.1.3 Develop timeline for Evaluation Plan and any training of Health Skill Builders staff by NWREL.

2.1.4 Provide additional technical assistance as requested by the Project Director, Health Care Skill Builders Program.

2.2 Designate and make known to SEIU one individual to act as contact person and liaison with SEIU.

3.0 SEIU AGREES TO:

3.1 Pay NWREL for the accomplishment of the specific tasks outlined in Section 2.0 above (analysis of interview data, evaluation plan and timeline, training plan and timeline) on a cost-reiumbursable basis not to exceed a total of $3,000.

3.2 Designate to NWREL the Project Director, Health Care Skill Builders Program as contact person and liaison with NWREL.

3.3 Provide on-site facilities, staff support and written and visual materials that are necessary for NWREL to complete the scope of the work specified in 2.0 above.

4.0 GENERAL TERMS AND CONDITIONS

4.1 The period of performance of this agreement shall be from Jan. 7, 1992 to Jan. 31, 1993.

4.2 This shall be a cost-reimbursable contract not to exceed $3,000. As such, NWREL will use its best efforts to complete the tasks set forth in 2.0 above. In the event that, in the judgement of NWREL, these tasks cannot be completed within the maximum costs set forth in 3.1 above, NWREL will give SEIU notice of that fact. Upon such notice, SEIU and NWREL shall negotiate either a reduction in the work to be performed by NWREL or increase payments to NWREL or both. Payment shall be made to NWREL upon satisfactory progress in the scope of the work and invoice by NWREL. The payment schedule shall be: February 20, 1992.

4.3 No alteration or variation of the terms of this contract and no understandings or agreements incorporated herein, unless made in writing between the parties hereto, shall be binding.

4.4 In performing services under this agreement, NWREL is an independent contractor and nothing herein is to be construed as establishing an employer-employee relationship. NWREL agrees that all the work performed will be in accordance with the highest professional standards.

4.5 All materials produced under the terms of this contract shall become the property of SEIU.

4.6 The parties hereby agree that no person shall, on the grounds of race, color, creed, national origin, or sex, be excluded from or denied participation in, or otherwise subjected to discrimination under any activity perfromed pursuant to this contract.

APPROVED:

NORTHERN CALIFORNIA JOINT COUNCIL OF SERVICE EMPLOYEES #2	NORTHWEST REGIONAL EDUCATIONAL LABORATORY
By _____	By _____
Title _____	Title _____
Date _____	Date _____

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Worker Education Program
Student Questionnaire

You have recently participated in a course provided by the Worker Education Program.

The Program is interested in hearing from you, ***whether or not you finished the course,*** in order to plan courses that really suit the needs of the workers in your hospital.

We do not ask you to sign your name to the questionnaire or tell us who you are, in order to encourage you to tell us what is really on your mind and what your experience was like in participating in the course. The questionnaire will be seen only by the staff of the Worker Education Program. No details of any person's questionnaire will be shown to or discussed with anyone else.

We appreciate the help you are giving us in filling out the questionnaire. Thank you for your time and thoughtfulness.

1A. What were the main reasons you decided to take the course? *(Answer this question by circling the number that best matches your answer to each part of the question listed below. In each part 5 = very important and 1 = not important at all, with the other numbers somewhere in between.)*

	Very important				Not at all important
I wanted to see how well I would do as a student.	5	4	3	2	1
I wanted to get my GED.	5	4	3	2	1
I wanted to prepare myself for college.	5	4	3	2	1
The course was given at a good time.	5	4	3	2	1
The course was free.	5	4	3	2	1
I was told that I would get release time.	5	4	3	2	1
The course was given at the hospital.	5	4	3	2	1
Co-workers were taking the course.	5	4	3	2	1
I thought the course would help me get a better job.	5	4	3	2	1
I thought it would help me do my present job better.	5	4	3	2	1
I wanted to learn the subject that was taught in class.	5	4	3	2	1
I wanted to help my family in their studies.	5	4	3	2	1

1B. Now underline the 3 most important reasons above for taking the course.

Comments:

2. How much support did you get from others in taking this course? *(Circle "0" if you had no contact with this person about the course.)*

	Very supportive				Very unsupportive	No contact
My supervisor	5	4	3	2	1	0
Other hospital administrators	5	4	3	2	1	0
Workers in my department	5	4	3	2	1	0
My family	5	4	3	2	1	0
Shop steward	5	4	3	2	1	0

	Very supportive				Very unsupportive	No contact
Union rep	5	4	3	2	1	0
Worker Ed. counselor/staff	5	4	3	2	1	0
Other workers in the class	5	4	3	2	1	0

Comments:

3. What were some things you liked best, if any, about this course?

4. What were some things you liked least, if any, about this course?

5. What suggestions would you make to a co-worker who is thinking of taking a course in this program?

a) _____

b) _____

c) _____

6. Getting release time to take the course was:	Very difficult				Very easy	Not relevant
	5	4	3	2	1	0

Please answer the next section to help us plan future classes

7. How likely are you to take another course in this program in the future? *(Next to each item, circle how likely you would be to take a course if the item was true; circle "0" if the item is not an important consideration for you.)*

	Very likely				Not likely	Not important
If I could take the next course in the same subject area	5	4	3	2	1	0
If the course was in a different subject area	5	4	3	2	1	0
If it's in the health care field	5	4	3	2	1	0
If it's directly related to my present job	5	4	3	2	1	0
If it covers job opportunities in health care	5	4	3	2	1	0
If it covers workplace issues (labor/management)	5	4	3	2	1	0
If it gives me college credit	5	4	3	2	1	0

8. Below are possible subjects in which WEP could offer courses to workers in your hospital. Which course would you like to take next, if the course was offered at the level best suited to you? Please rank your 1st choice, 2nd choice and 3rd choice.

- ☐ English *(writing and reading)*
- ☐ Basic math
- ☐ Business math
- ☐ Medical terminology
- ☐ Introduction to computers
- ☐ Typing/Keyboarding
- ☐ GED preparation
- ☐ Others: _____

_____

9. How important were the following factors in your decision to drop out of the class?

	Very important				Not at all important
The class was too easy.	5	4	3	2	1
The class was too difficult.	5	4	3	2	1
I developed health problems.	5	4	3	2	1
Family pressures became too great.	5	4	3	2	1
I had problems getting time off from work at the hospital.	5	4	3	2	1

	Very important				Not at all important
I have a second job that conflicted with the class.	5	4	3	2	1
I wasn't learning something that would help me get a GED diploma.	5	4	3	2	1
I wasn't learning something that would help me get a better job.	5	4	3	2	1
I wasn't learning something that would help me do my present job better.	5	4	3	2	1
The homework was taking too much time.	5	4	3	2	1
I didn't like the way the class was taught.	5	4	3	2	1
The class was going to take too many weeks to finish.	5	4	3	2	1
The time of the class turned out to be inconvenient.	5	4	3	2	1
I had transportation problems.	5	4	3	2	1
I didn't like taking the course with other workers.	5	4	3	2	1
I started taking classes somewhere else.	5	4	3	2	1

Now underline the most important reason(s) above and on previous page for dropping out of the course.

Other important reasons: _____

_____

10. I went to:

- ☐ 1 or 2 classes
- ☐ 3 or 4 classes
- ☐ 5 or 6 classes
- ☐ more than 6 classes

Please give us the following information about your work and educational history.

11. In this program, the class I took was in:

- ☐ English
- ☐ Math
- ☐ Medical Terminology

12. I work in the _____ department.

I work as a _____.

I have worked in this hospital for [ ] years.

I have worked in my current position for [ ] years.

13. What is the highest grade of school you have completed? *(check one)*

- ☐ grade 6 or less
- ☐ grade 7-9
- ☐ grade 10-11
- ☐ high school diploma
- ☐ GED
- ☐ College graduate (AA degree) _____
- ☐ College graduate (BA degree) _____

Have you ever received college credit for any courses?

☐ Yes ☐ No

Have you ever completed a job training program (not leading to a college degree)?

☐ Yes ☐ No

If yes, what kind of training? _____

_____

14. Are you a union member?

☐ Yes ☐ No

Demographic information:

15. Sex:

☐ Male ☐ Female

16. Ethnic background:

- ☐ African-American
- ☐ American Indian or Alaskan
- ☐ Asian or Pacific Islander
- ☐ Cape Verdean
- ☐ Haitian
- ☐ Hispanic
- ☐ White
- ☐ Other _____

Use back page for any additional comments you may have.

SAMPLE PROGRAM #3

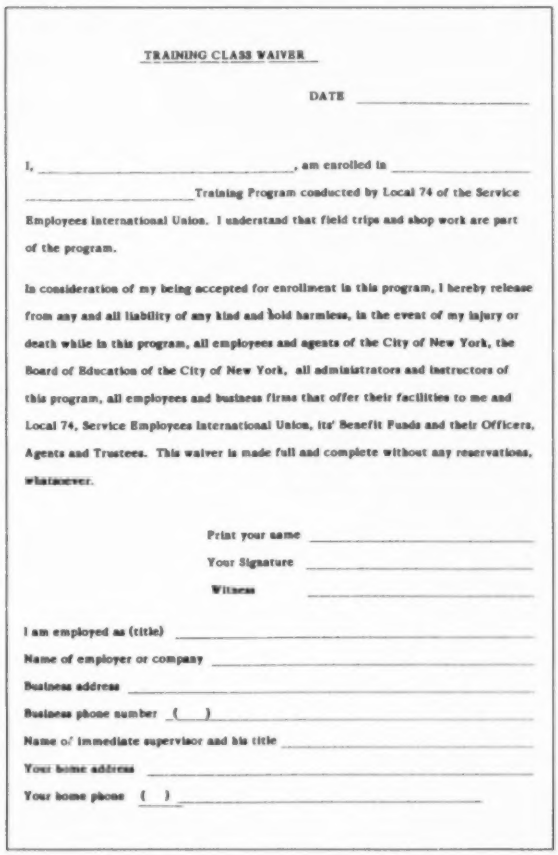
A Union Training Program

Goal: Local 74 provides full career-path training opportunities to all members of the local.

Funding: A negotiated ERISA fund agreement administered by the local union. Annual budget: Approximately $500,000.

Staff: The union has a funds administrator to run the education and scholarship funds, as well as the local's other ERISA funds. A full-time education director staffs the training program, and teachers are hired directly by the union.

Curriculum Design: The union controls all the curriculum, hiring a curriculum consultant to work with senior workers in the fields covered to produce appropriate job-based curriculum. An additional concern is coordinating the curriculum with state and city certification exams.



TRAINING CLASS WAIVER

DATE _____

I, _____, am enrolled in _____

_____Training Program conducted by Local 74 of the Service Employees International Union. I understand that field trips and shop work are part of the program.

In consideration of my being accepted for enrollment in this program, I hereby release from any and all liability of any kind and hold harmless, in the event of my injury or death while in this program, all employees and agents of the City of New York, the Board of Education of the City of New York, all administrators and instructors of this program, all employees and business firms that offer their facilities to me and Local 74, Service Employees International Union, its' Benefit Funds and their Officers, Agents and Trustees. This waiver is made full and complete without any reservations, whatsoever.

Print your name _____

Your Signature _____

Witness _____

I am employed as (title) _____

Name of employer or company _____

Business address _____

Business phone number ( ) _____

Name of immediate supervisor and his title _____

Your home address _____

Your home phone ( ) _____

Trainee Selection: All classes are open to all members who qualify for that classification and who have worked a consecutive 12 months with a minimum of 60 hours a month for an employer who contributes to the fund.

Education Components: Courses offered on a regular, rotating basis include:

- English as a Second Language
- Basic Skills/High School Equivalency Preparation
- Small Engine Repair
- Air Pollution Control/Basic Boilers
- Electricity and Burglar Alarm Installation and Service
- Building Maintenance I
- NYC Refrigeration License Preparation
- School Fireman
- Custodian Exam Preparation.

Employer Participation: Classes are offered on-site, at school buildings where members work, and at the union building. The union reimburses the school district for space and retains all decision-making control over the program.

TRAINING & SCHOLARSHIP FUND
Local Union No. 74 of the
SERVICE EMPLOYEES INTERNATIONAL UNION AFL-CIO, CLC

This is to certify

has Successfully Completed A Course In

Jack Allen
President

Local 144 Health Facilities
Training and Upgrading Fund

CERTIFICATE OF ACHIEVEMENT

Be It Known That

Has Completed

thereby advancing in technical competence
and ability in the health care industry.

Chairman, Board of Trustees

Congratulations!

has completed
the English Skills Upgrade Course
Fall 1991

Merritt College

Sponsored by
the Northern California Joint Council of Service Employees No. 2
and Merritt College

in cooperation with:
Fairmont Hospital, Alameda County Health Services

Shirley Ware
Secretary-Treasurer, SEIU Local 250

Peter Hogan
Director, SEIU Workplace Education Program

CHAPTER THREE

Finding The Funds To Run Your Program

There are two main sources of funds for workplace education programs: collective bargaining agreements and education and training grants from state or federal government. Private foundations are a third, though minor, source.

BUILDING EDUCATION INTO YOUR CONTRACT

Jointly negotiated education programs can be an important part of the union's plan to protect members' jobs and improve their skills. Guarantees of support for the program for the life of the contract can reduce uncertainty about its future and free union reps from the time-consuming process of looking for funding.

SEIU locals have found that the process of negotiating programs is an education in itself for union reps and management. Defining career ladders and the requirements for certain jobs educates both workers and supervisors about mobility and minimum qualifications.

Items to Negotiate

The following is a list of items you may want to consider during negotiations. Exact contract language will vary, of course, depending on your particular situation.

1. **State the objectives of the program,** establishing its value for both parties as a means of fulfilling personal and job-related goals.

2. **Endorse the concept of worker-centered learning.** Do you agree that workplace-based curricula are the way to go? Are there guarantees of voluntary participation and confidentiality?

3. **Set up the funding mechanism and rate** (for example, the employer contribution per hour or per capita).

4. **Describe the governing structure,** including the make-up of the advisory committee, the selection of the administrator, the lines of authority.

5. **Establish a problem-solving mechanism,** either as part of existing grievance procedure or a separate structure.

"You've got to get members to value education programs as a bargaining issue, so that it's a priority for their contract, something they're willing to trade other items for. Otherwise, you're entirely dependent on federal or state money, or the employer's generosity."

6. **Define the program's relation to existing benefits** such as tuition reimbursement.

7. **Provide financial incentives,** such as release time for students and learning advocates, or training stipends.

8. **Establish allowances** for educational leave without pay.

9. **Spell out employment security questions.** Will the student be assured of a job on completing the course? Is there an agreement that low reading scores or other test-related results will not jeopardize the participant's job?

10. **Spell out the student's responsibility to the employer,** if any. Should you specify that the student must promise to stay on the job for a certain period in exchange for employer-provided training?

11. **Describe any related services,** such as educational counseling, child care, or transportation.

Tuition reimbursements

Tuition reimbursements can become one of the most costly components of a negotiated program. The question of who pays for training or college credits must be established from the outset.

One SEIU local negotiated a collective bargaining agreement that expanded the tuition reimbursement program beyond degree programs to include certification classes or specific skills training.

Another upgraded contract language to have the traditional $50,000 centralized training fund cover programs other than in-house training.

The flip side of tuition reimbursements is the question of whether students owe something to the employer in return for their training. This repayment could be in the form of a commitment to stay on the job for a specified period of time.

Release time

It's one thing to agree on the general concept of release time, quite another to hammer out the details, such as how

Sample Contract Language

ARTICLE XXVI
EDUCATIONAL TRAINING

1. Regular full-time Employees after one (1) year of continuous service shall be eligible for educational benefits pursuant to the terms of the Educational Training Program.

Upon approval of an eligible employee's application, he/she may receive 50% reimbursement (upon completion and submission of receipts) for the cost of tuition and books for non-required courses, training or seminars in the long-term health care field.

Reimbursement under this program will not be granted where the individual fails to obtain a grade of "C" or better in the course, training, or seminar. The Employer reserves the right to limit the number of applications which may be accepted from any respective department of the facility.

2. (a) Effective December 15, 1991, the education benefits in paragraph one of this article shall be discontinued and the Home shall contribute to the New England Health Care Employees Training Fund (the "Training Fund") and shall make monthly payments based upon the previous month's payroll.

(b) The contribution shall consist of a sum equal to one half percent (.5%) of the monthly gross payroll of Employees in the bargaining unit, exclusive of amounts earned by Employees who have not completed their probationary period. Effective June 15, 1992, this contribution shall be increased to one percent (1%) of the monthly gross payroll.

Potential Problems With Release Time

ALERT

Agreements about release time should be specific as possible to avoid the following conflicts:

- **Shifts.** Problems arise when a scheduled class spans more than one shift. Some students may be attending class on release time, while others are there before the shift begins or after it's over. Think about how to make the release time benefit fair to everyone.

- **Increased workloads.** The workers who aren't taking a class shouldn't have to cover for those who are. Nor should the employer increase the workload for students. One local's employer did, which made it hard for the students to come to class and still keep up on the job.

One way to resolve these problems is to make it clear that everyone who is interested will have a chance to participate eventually, and that what seem to be inequities will balance out in the end. Another way is to schedule all classes outside of working hours.

many people from each department can be out at the same time, or how to take different shifts into account. To avoid mix-ups, if paid release time is part of the agreement, there should be a letter of understanding that everyone signs — the employee, the supervisor and the union counselor.

When the issue of who is going to pay for release time is worked out in advance, the pressure is off both the manager and the worker. Supervisors want to know how they're supposed to keep their departments functioning with fewer staff. Workers want to be assured they won't be penalized for missing time at work.

Program leaders have found that many of the problems with release time are resolved once the program has been in operation for a while. Supervisors become accustomed to the idea of workers leaving their posts to attend class, and they come to see the positive results they'll get something back in terms of people's self-esteem, interest in their jobs, competence, and satisfaction with life in general.

Sample Form

Problem With Worker Release

Hospital Name _____ Date _____

Last Name _____ First Name _____

Dept. _____ 1st Supervisor _____

Shift _____ Class title _____

Time _____ Days _____

Describe Work/Class Incident (briefly):

(please print) _____

_____

_____

Who have you notified about the incident?

Teacher:
Name _____ Yes ____ No ____

Union Steward:
Name _____ Yes ____ No ____

Union Counselor:
Name _____ Yes ____ No ____

1st Line Supervisor:
Name _____ Yes ____ No ____

Department Manager:
Name _____ Yes ____ No ____

Personnel Director:
Name _____ Yes ____ No ____

Please complete and return to teacher or union counselor.

Sample Contract Language

TUITION REIMBURSEMENT

ARTICLE XI - PROFESSIONAL ADVANCEMENT

Section 1. Tuition Reimbursement

The Hospital promotes the improvement of professional skills in the worker's related field through academic achievement. A full-time worker, on active status, who has completed his/her probationary period, and who has been employed for at least six (6) months, shall be eligible for tuition reimbursement for matriculated courses related toward an Associate, Bachelors Degree, ART (Medical Records) and CLEPS and shall be reimbursed for the cost of tuition up to a maximum cost to the Hospital of $1000.00 each benefit year (up to $1000 for Associate's Degree). All courses must be related to the worker's job at Cape Cod Hospital and approved prior to starting the course by the Department Head. Grade "C" or better in all courses of study must be attained in order to qualify for reimbursement. Workers in matriculated courses leading to a Master's or Doctoral degree shall receive tuition reimbursement up to $1000 per year provided the worker receives a grade of B or better in such course(s). Approved course, not related to a Degree, but related to the worker's present job, shall be reimbursed, as above conditioned each benefit year, to a maximum cost to the Hospital of $320.00. All reimbursements are for tuition and required fees.

If the worker agrees to remain in the Hospital's employ for a period of one (1) year from completion of the course, he/she will be allowed to take approved courses that are reasonably related to job advancement within the Hospital up to $1000; if the worker leaves within a year, he/she will be required to pay back to the Hospital a proportionate amount of the costs paid by it.

Tuition reimbursement shall be paid in advance where the Hospital receives the request two weeks in advance of payment or the Hospital shall pay within two weeks of receipt of the paid bill. The Hospital shall pay the following percentage in advance for tuition and fees:

Base Hourly Rate	Hospital Advance on Tuition & Fees
$13.50 & below	100% of entitlement
$13.51 - $16.00	50% of entitlement
$16.01 - $20.00	25% of entitlement

Section 2.2. Tuition Reimbursement

(a) Effective March 31, 1991, a regular full-time worker who has completed his/her probationary period may be reimbursed 85% of the cost of tuition not to exceed $700 (or $850 in the case of graduate courses) for State schools, private schools or post graduate study in a calendar year for successfully completing courses of study directly related to a job at the Hospital, which courses are not covered by scholarship or the G.I. Bill.

EDUCATION LEAVE

Section 5. Education Leave

The Employer may allow a Leave of Absence without pay, up to twelve (12) months for a worker's educational advancement. Upon his/her return, the worker will be given the first opportunity to return to his/her former position, if and when the position is open.

The Hospital may allow an LPN Leave of Absence, without pay, up to twelve (12) months for educational purposes, and upon his/her return, the LPN will be reinstated to his/her former position and Department, if he/she so desires.

Section 10.7. Educational

The Hospital may allow a worker a leave of absence without pay up to 12 months for educational purposes and upon his/her return from such leave, the worker will be reinstated to his/her former position and department if such position is vacant; if such position is not vacant, he/she may bid for a vacant position in accordance with Section 11.4 and will in any event be given the first opportunity to return to his/her former position if and when the position is open. Such permission shall not be unreasonably withheld.

A worker taking a two-year RN course shall receive such leave and shall be entitled to his/her job back, both in the summer and upon his/her return, if eligible.

CAREER LADDERS

Section 3. Career Ladders

The parties shall study, develop and maintain a career ladders system, the details of which are more fully set forth in a separate agreement.

Section 11.5. Career Ladders

The Hospital and the Union shall meet regularly in a career ladder committee of three Union representatives and three Hospital representatives which, in good faith, shall develop a program that enhances career advancement opportunities and recognizes seniority and qualifications.

WHAT'S IN IT FOR THE EMPLOYER?

The employer may be more likely to consider a worker education program as part of a negotiated contract if you point out some of the following benefits:

▶ **Increased capacity to hire from within.** Addressing the basic skills/literacy needs of employees in entry level positions will create a larger pool of people eligible for promotion. Trained employees are a valuable resource.

▶ **Enhanced job performance.** Instruction in job-specific reading, writing, and computational skills will give employees a greater ability to follow written instructions, cope with new technology, write memos, etc.

▶ **Postitive impact on employee morale.** A sense of opportunities for advancement, through the basic skills instruction, will increase workers' interest in pursuing the career ladder with their current employer.

▶ **Curriculum tailored to the workplace.** The input of employers (managers, supervisors) can be a key aspect of devising and implementing a curriculum that addresses the needs of specific work locations and job classifications.

Through participation in site-specific skills assessment and serving on an advisory board, employers will have a role in shaping the curriculum and input into program planning and development. Materials used in the Basic Skills and ESL classses will be ones used on the job and relevant to promotional opportunities.

▶ **High level of retention and success.** One of the key problems faced by worker education programs can be keeping students in the program. The activities of the learning advocates will insure maximum participation and retention.

In recruiting students, acting as tutors peer support in the classroom, and contributing to curriculum development, the learning advocates will provide a continuity and level of support for the participants.

▶ **Cost effective.** Given that the local union will take responsibility for the administration of the program and training of instructors/learning advocates, the cost to the employer is not great.

▶ **Enhanced community visibility and public image.** Employer participation in a workplace education program provides a unique opportunity to demonstrate a commitment to the community the employer serves. Employees with literacy problems and minority employees with language barriers are in great need of an education program that addresses the issues affecting career mobility.

Both employers and the union will experience positive community visibility and an enhanced public image by providing such a program for employees.

EDUCATION AS AN EMPLOYEE BENEFIT

Negotiated Agreements: ERISA and Taft-Hartley

The most secure source of funding for an education program is a negotiated training trust. Obviously, the ease with which a local can bargain this money will vary with the times, but bargained funds will allow for long-term planning and institutionalization of the program.

There are basically two sets of federal guidelines which cover funds resulting from collective bargaining: Taft-Hartley and ERISA. The restrictions placed on education trusts under each are very similar, but there are a few significant differences.

Taft-Hartley

Funds collected into Taft-Hartley trusts can be used for providing such things as group insurance coverage for union members or the establishment of an education and training program. Federal rules require that the funds be used only for members of the collective bargaining unit, so, if necessary, benefits for other employees must be provided in another way.

Contributions to Taft-Hartley trusts are often made by employers based on the number of hours worked by the employees in the bargaining unit, regardless of whether all of them receive the benefit, in this case, the education. Eligibility for benefits is based only on some minimum number of hours worked during a certain time period.

There are four requirements that must be satisfied for Taft-Hartley:

1. **Written agreement.** The basis on which payments are to be made by the employer must be specified in a written agreement between the employer and the union.

2. **Separation of funds.** The payments must be held in trust for the purpose of providing certain benefits to employees, and pension trusts must be kept segregated from health and welfare trusts.

3. **Joint administration and equal representation.** The trusts in which payments are held must be jointly administered by the employers and the unions, who must be equally represented. All aspects of a Taft-Hartley program will therefore be handled by a joint labor-management board. The trustees will essentially run the program.

4. **Fairness.** Trustees must act for the exclusive benefit of the employees and may not act in an arbitrary or capricious manner.

Although there are general rules about the structure and content of collectively bargained employee benefit plans, there are no explicit regulations about administration.

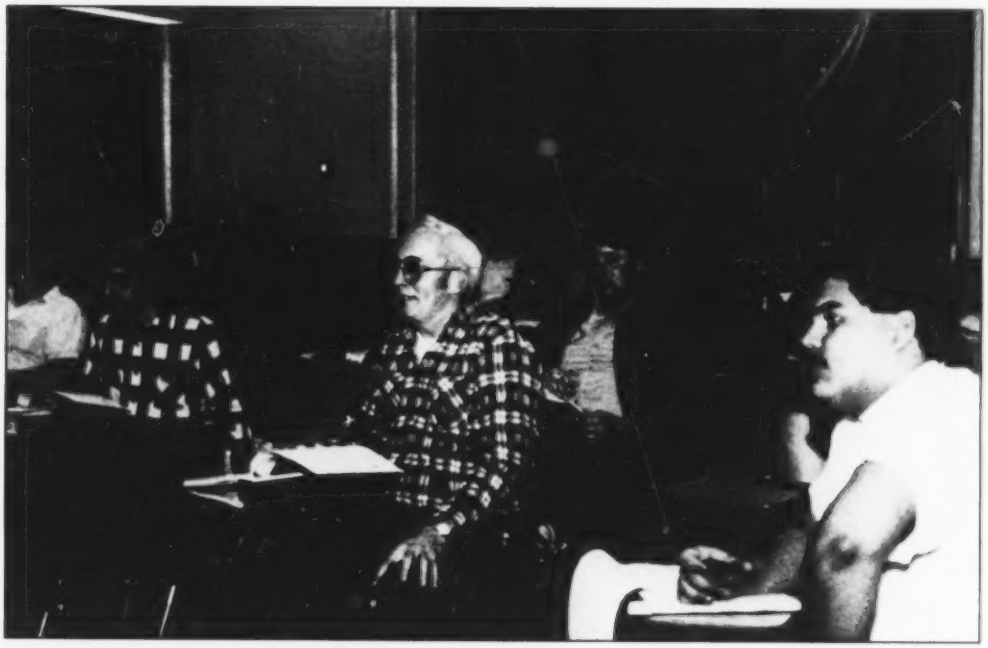
ERISA

ERISA (The Employment Retirement Income Security Act) is generally thought to govern pension plans, but training and scholarship programs also fall under its guidelines.

ERISA trusts generally are subject to the same guidelines as a Taft-Hartley trust, but there are two important differences. ERISA programs are subject to rules about course content. Says one local leader, "The federal government guidelines dictate your program somewhat. We can't file an ERISA plan for a training program and teach, say, gourmet cooking. The training has to be job connected; it has to upgrade the employee in some way."

The second, and more important, difference is that, while Taft-Hartley trusts must be jointly administered, ERISA funds can be administered solely by the union.

One word of caution: Both these funds are complicated enough that their set-up and administration require the assistance of an attorney. Check with a lawyer for guidelines before entering into negotiations. The time taken will be worth it so your local can have a long-term, viable program able to protect the members' interests and meet their needs without constantly scrambling for outside funding.



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"If you can envision what you want to accomplish and what you want a project to look like, and write that down, there's no reason your local can't get a grant. People shouldn't be afraid to do it just because they've never done this sort of proposal before."

APPLYING FOR GRANT MONEY

Local unions can turn to the federal, state or local governments or private funders for money to get their program off the ground or keep it in operation, even if they also have negotiated education agreements with their employer.

In general, federal money is for demonstration programs, while state money is job-related.

Demonstration programs are short-term (rarely longer than one year) model programs designed to try out new and different concepts in education and training. For example, the first Learning Advocate program was funded with seed money. The funders look for programs that can be duplicated in other areas, and are thus interested in quantifiable results.

States and cities receive federal money for education and training programs, and also allocate state and local funds for that purpose. By funding adult job training programs, they hope to get people off the unemployment rolls and into entry-level jobs, or cut down on turnover. Regulations vary from state to state, even in their use of federal funds, so make sure you become familiar with your own state's opportunities and requirements.

Remember that unions are competing with private consultants, educational institutions, and employers for the same pool of money. Because union sponsorship is a valuable part of any grant proposal, don't trade it away lightly. When applying for a grant jointly with the employer, be sure not to sign off on their proposal without demanding something in return for union sponsorship, such as some measure of control over administration, participants, or curriculum. As one local union leader put it, "If the employer is proposing to spend $67,000 in salary for a slick, paid consultant, the union should be able to get money for a paid staff person as well."

Getting grant money is often a political process, dependent on having the right connections, so it helps to have someone you can turn to who knows the ropes. Local unions can get advice from . . .

- the union's political or government affairs staff person,
- a contact at the local university or college,
- the international union, which keeps track of federal legislation and requests for proposals.

Whatever you do, try to maintain control over the writing and planning of grant proposals, because they determine the thrust of the program. Guard against contracting out your program to "professionals" because you don't have enough time.

Be creative: The Occupational Safety and Health Administration (OSHA) has money available for health and safety training that has easier reporting require-

ments and fewer strings attached than other kinds of federal money. A local could tap into OSHA funds by combining health and safety training with its other agenda, English as a second language, for example.

Watch Your Pennies

No matter who funds your program, be careful with your money. Proper recordkeeping is a must, or you'll face trouble down the road.

Keep track of all expenditures of funds, from the small items like office supplies and printing to larger outlays for instructors, classroom rent, or tuition reimbursements. Make up a form for each student, documenting participation.

One union ran into trouble by not following the legal requirements of the training trust fund they set up with the employer. By not spending enough on the program, they developed a large surplus. They were put in the uncomfortable position of allowing the employer to suspend contributions or paying a substantial percentage of the surplus in taxes.

Any funds you receive from the federal government subject your local to a detailed, public audit that the grantee must pay for. Therefore, it's important not to mingle federal grant money in the union's general fund.

The Disadvantages Of Grant Money

While getting grant money to pay for your program may seem like a blessing, there are definite disadvantages.

The grantor may have requirements

ALERT

Receiving $100,000 in federal funds, or only $25,000 as a subcontractor from another recipient, makes you liable for federal audit.

The best way to separate your program's finances from those of other union efforts is to set up a non-profit corporation [or 501(c)(3) organization] to collect and administer the funds. Having non-profit status also makes your program more attractive to other money sources who may be looking for a tax deduction or to foundations who only give to recognized non-profit or educational agencies.

While 501(c)(3) corporations are not difficult to set up, you will need a lawyer's help, and the process can take up to a year. Until you get your ruling, be scrupulous in keeping any federal money you've received in a separate account.

and expectations that differ from those of the union. For example, they often require a detailed evaluation or assessment of results, especially when the grant is considered seed money or funding for the development of a model program. This may not be the union's idea of a valuable expenditure of resources — either time or money.

Many grants contain burdensome and time-consuming recordkeeping or reporting requirements which add to the bureaucracy of the program and do little to provide direct services to the membership.

One-year grants have a built-in frustration factor in that almost as soon as the program is off the ground, the staff has to go through the time-consuming process of applying for funding to keep it going.

The Hazards of Hiring Professional Grant-Writers

One local union found itself in big trouble when it hired a professional consultant to write up its grant proposal and didn't take the time to oversee it. The writer got them money, all right, but it was for a huge project involving technology that didn't even exist in their state.

By the time the local discovered it couldn't deliver on its promises, the grant writer was long gone.

CONCLUSION

It's Worth It!

Today, SEIU local unions face the challenge of responding to a changing workforce, work environment, technology, and regulations that directly affect their members' job security and mobility.

Workplace education empowers the learner to become a strong, participatory member of her or his union, workplace, and community. It is a union benefit that is life-long and will be passed on to their children and to the world around them.

Although we have outlined many potential hazards and problems in developing a strong, union-based education program, they are easily overcome. Just remember, there are four basic keys to the success of any program:

- **Involve the workers.**
- **Involve the employer.**
- **Establish equal partnership.**
- **Allow enough time.**

Developing a successful union education program may be complicated, but it is well worth it. If you are a small local union, join resources with another local or work with your joint council. Get help getting started from other locals that already have programs or from the International.

The most important thing to remember is, **You can do it!**

"The members love to share — learning or teaching. It's a basic thing people like to do, given a chance. And few work situations give people that chance. I think it's a way for people to feel proud to be a part of the union movement."

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